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ABSTRACT

This teaching guide contains guidelines for conducting five secondary-level marketing cluster courses--Retailing 102, Promotions 202, Relations in Business 202, Management 302, and Marketing Practicum 302. Covered first are goals and objectives, teachers' notes and suggested activities, lists of suggested materials, and guidelines for correlating course content with supported materials. Addressed in the retailing course are checker/cashier operations; receiving and marketing merchandise; analyzing target markets and displays, buying, and pricing. Various aspects of promotions are examined, including color, lettering, and design; advertising; special promotional activities; display; and customer services. Dealt with in the business relations course are personality; communication; employer/employee, customer/salesperson, and buyer/vendor relationships. Among the management principles treated are objectives, ethics, decision making, functions of management, planning, organizing, directing, controlling, and leadership. The marketing practicum includes materials on planning, organizing, directing, and controlling goals as well as with various practicum delivery systems. A bibliography, handbook of forms, and transparency masters conclude the guide. (MN)

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These guides replace the Marketing Education guides of 1971, and become effective generally in September, 1982. They have been developed as part of the Marketing cluster of courses designed to provide guidelines for vocational business education.

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Members of the Marketing Curriculum Committee:

David Bissky
J.H. Bruns Collegiate
St. Boniface School Division #4

W. Ulrich (Chairperson)
St. John's High School
Winnipeg School Division #1

Hugh Delaney
CKRC Radio Broadcasting
Winnipeg, Manitoba

William Zbernowsky
Maples Collegiate
Seven Oaks School Division #10

Glen Martin
Sturgeon Creek Regional
Secondary School
St. James-Assiniboia
School Division #2

Gerri Tennant
Dauphin Regional
Comprehensive Secondary School
Dauphin-Ochre School Division #33

Consultants to the Committee:

I.M. Dryden
and
H. Marshall Draper
Program Development Directorate
Manitoba Department of Education

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RATIONALE

The Marketing cluster comprises five courses: Retailing 102, Promotions 202, Relations in Business 202, Management 302, and Marketing Practicum 302. Each, with the exception of Marketing Practicum 302, may be taken as an option by any student and in any sequence to related courses. Marketing Practicum 302 is not recommended as an elective course separate from the other four marketing courses, and requires as prerequisites Retailing 102, Promotions 202, Relations in Business 202, and Management 302.

Programs in Marketing may be offered with or without the use of a store-laboratory. Assistance on planning programs without a store-laboratory may be found in the curriculum outlin for Marketing Practicum 302.

Retailing 102 (Marketing 102)

Retailing 102 provides a basic introduction to the skills and practices required in job-entry level positions in retail merchandising. The course is appropriate to a wide range of abilities, and, as such, is useful as an overview of marketing for all interested students. In addition, Retailing 102 provides vocational preparation both for students seeking part-time retail employment and for those who choose to leave school for full-time employment.

Promotions 202 (Marketing Lab 202)

Promotions 202 is designed to help students to develop skills in the theoretical and practical applications of projects related to assessing needs, catering to appeals, and meeting needs through advertising, display, personal selling, and special activities. The vocational business education student would thus undertake Promotions 202 as that part of the Marketing program which provides insights to the foregoing aspects of the distribution of goods and services.

Relations in Business 202 (Marketing 202)

Relations in Business 202 deals with relationship concepts that would be of special interest to marketing students in their study of people-centered activities. The course deals not only with interpersonal relationships on the job, but also with the special relationships between employer-employee, employee-employee, salesperson-customer, and vendor-buyer. In addition, the topics dealing with communication skills and personality help to make the the course valuable to any student in the school, and particularly to other business education students interested in office occupations.

Management 302 (Marketing 302)

Management 302 introduces the marketing student to leadership principles and practices in the management cycle of planning, organizing, directing, and controlling. As such, the course provides a systematic approach to handling routine activities in business and personal life and is suited to any student in the school.

Marketing Practicum 302 (Marketing Lab 302)

Marketing Practicum 302 provides job preparation in marketing by synthesizing the theories and practices studied by the vocational marketing major in a business education program. For that reason, and because the course is largely practical, it requires as prerequisites the four marketing courses described above.

The objectives of Marketing Practicum 302 may be attained by any one or any combination of three methods:

1. Store-Laboratory Management: Students obtain practical experiences in a school store-laboratory;
2. Cooperative Work Education: Students share responsibilities and experiences at a training station in the local business community;
3. Business Feasibility Seminar: Students conduct and present to critics hypothetical business feasibility proposals.

Depending upon the community and school resources, the school may choose to offer one, two, or the three delivery systems. For example, small and remote schools may not have school store laboratories; some communities may not facilitate a cooperative work education program; and small classes might lend themselves to a contract system using a business feasibility seminar. In addition, the assessed needs of students and the size and number of classes may result in choices to combine these options for special student needs or preferences. There are several objectives that are common to all of the delivery systems, and having elected the appropriate delivery system(s), the teacher should refer the common objectives to those within the specific delivery sytem when preparing lessons.

Complementary courses to marketing would include Accounting 202/302, Data Processing 202/302, Typewriting 102, and electives from the Socio-Economic cluster of courses.

EVALUATION

Marketing courses emphasize both principles and practices.

Evaluation should be based upon the objectives found in each curriculum outline. Periodic tests would serve both the theoretical concepts' testing and the practical tests associated with the laboratory, work station, or simulation projects.

Vocational standards common to business should be the focus for evaluation. Validity should be related to realistic occupational settings. Student achievement may be individually assessed because of the varied activities that individual students may focus upon as suited to their aptitudes and needs.

TIME ALLOTMENTS

Each of the Marketing courses is to be considered one credit in secondary schools. It is expected that each credit course would demand 110-120 hours of instruction.

RETAILING 102

I. Program and Course Introduction

The student should be able to:

- outline the history of marketing,
- identify the functions of marketing;
- identify employer needs in the work place;
- identify employee need satisfiers on the job;
- prepare for employment:
  a) type a resumé,
  b) obtain references,
  c) write letters of application;
- identify job opportunities in marketing;
- identify job-entry opportunities in retailing and outline opportunities for advancement;
- identify careers available after receiving post-secondary education.

II. Checker-Cashier Operations

The student should be able to:

- understand the need for and the importance of checker-cashier operations;
- use the correct procedures for recording a cash sale on a cash register;
- make change;
- make a cash float;
- record returns and adjustments;
- handle cheques;
- handle other sales transactions:
  a) fill out layaway forms,
  b) process charge sales,
  c) process discounts and coupons,
  d) process credit card sales;
- calculate sales tax mentally and by using a chart or the cash register;
- understand the need for and the importance of a systematic checkout procedure;
- establish and maintain customer rapport and goodwill;
- demonstrate good business ethics;
- replenish stock at the checkout station;
- practise good housekeeping at the checkout station;
- package merchandise for security and customer service;
- obtain approval for cheques, returns and adjustments;
- perform other duties as assigned.

III. Receiving and Marking Merchandise

The student should be able to:

- understand the need for and the importance of a systematic receiving procedure;
- develop a systematic receiving procedure;
- identify and use the forms for the receiving function;
- identify the need for security;
- understand the importance of moving merchandise to the proper storage areas;
- understand the need for cleaning the receiving area;
- understand the need for and the importance of a systematic marking procedure;
- develop a systematic marking procedure;
- process invoices and prepare claims;
- identify various devices for tagging merchandise;
- prepare tickets for tagging merchandise;
- identify and apply different marking systems congruent with different types of merchandise;
- demonstrate a knowledge of equipment used to prepare tickets;
- identify proper placement of tickets on different types of merchandise;
- understand the need for displaying or storing ticketed merchandise in appropriate areas;
- file business forms;
- understand the need for and the importance of an
- inventory;
- calculate the value of an inventory;
- identify and use inventory control methods;
- identify and control shrinkage;
- analyze shoplifting;
- explain shrinkage resulting from errors;
- compute turnover ratios.

IV. Analysis of Target Market

The student should be able to:

- identify demographic dimensions of the target market;
- identify psychographic dimensions of the target market;
- understand the need for and the importance of product knowledge;
- identify the characteristics of any product;
- recognize customer needs and relate to product information;
- use product knowledge to assure customer of need satisfaction;
- demonstrate good business ethics;
- understand and apply the AIDA concept;
- identify and analyze the needs and wants of customers;
- list customers' buying motives;
- identify and explain buying decisions.

V. Selling Process

The student should be able to:

- identify the approaches;
- understand the use of approaches;
- recognize customer indicators of needs;
- understand and demonstrate techniques for a sales presentation;
- differentiate between sincere objections and excuses;
- turn excuses into sincere objections;
- demonstrate the ability to overcome sincere objections;
- detect customer readiness to buy;
- identify methods for assisting the customer to make a choice;
- review the needs of the customer and match them to the merchandise;
- close the sale or repeat the selling process;
- identify the principles of suggestion selling;
- demonstrate the principles of suggestion selling;
- identify and explain special selling techniques;
- demonstrate the ability to use the techniques for door-to-door and telephone selling;
- explain and diagram selling by computer system;
- identify and explain the special sales forms;
- demonstrate the ability to use special sales forms;
- define and understand the need for business image;
- project and maintain a business image with the target market;
- define goodwill;
- define and discuss the concept of clientele;
- handle customer complaints.

VI. Displays

The student should be able to:

- understand the purpose and the importance of the different types of displays;
- classify types of displays;
- identify the basic components of displays;
- demonstrate the ability to use the following techniques in preparing displays:
  a) apply the psychology of color,
  b) prepare showcards and posters,
  c) apply the principles of design,
  d) use lighting effectively,
  e) select and use arrangements congruent with merchandise;
- create displays for specific promotions;
- plan the location of displays for maximum appeal;
- evaluate displays based on specific criteria.

VII. Buying

The student should be able to:

- distinguish between stock checks and inventories;
- perform a stock check;
- prepare orders based on stock records;
- describe the effects of seasonal cycles on business purchasing decisions;
- locate suppliers;
- distinguish between consignment buying and memorandum buying;
- understand the need for and the importance of a systematic buying procedure;
- prepare purchase orders from stock checks and other objective data;

- update the stock;
- understand laws related to buying;
- list services provided by suppliers;
- demonstrate good business ethics;
- identify and distinguish between the various delivery procedures;
- follow-up on completion and delivery of orders;
- diagram distribution channels;
- explain the advantages and disadvantages of buying through brokers, agents, and groups;
- prepare charts to illustrate fashion cycles for specific merchandise;
- describe the relationship between wholesaling and retailing;
- explore career opportunities in buying;
- identify the functions and purposes of a wholesaler;
- describe the customer services that a wholesaler might provide;
- discuss the principal elements of wholesaling promotional strategies;
- discuss and explain the appropriate methods of shipping, moving, and storing merchandise in a warehouse;
- identify career opportunities in wholesaling.

VIII. Pricing

The student should be able to:

- prepare pro forma invoices;
- understand the influence of competition;
- apply related concepts of mathematics;
- express all costs as a percent rate of sales;
- understand the basis for establishing a reasonable markup on merchandise;
- understand the need for and the importance of a systematic pricing procedure;
- demonstrate the use of a profit meter;
- calculate the relationships betwewen revenues (sales), costs, and profits:
  a) prepare a break-even analysis,
  b) prepare a simple merchandise income statement;
- calculate markup on retail value of merchandise;
- calculate markdown on retail value of merchandise;
- understand the use and effect of loss leaders;
- demonstrate the ability to establish multiple pricing for merchandise;
- establish discounts;
- develop the ability to apply price lining to pricing merchandise.

PROMOTIONS 202

I. Introduction

The student should be able to:

- understand the need for and the importance of promotions in marketing;
- recognize the necessity of developing and maintaining one theme in a promotion;
- identify the four components of a promotion.

II. One Theme for Promotions

The student should be able to:

- demonstrate a knowledge of the aims and objectives of a theme;
- identify the types of themes that promote goods and services;
- identify the types of themes that create goodwill;
- develop an awareness of the need for resources and budgets to prepare a promotion;
- define the target market concept;
- define the target group:
  a) list the psychographic dimensions of the target group,
  b) list the demographic dimensions of the target group;
- emphasize the product or service features that appeal to the target group;
- identify the one theme that ties the four components together;
- identify the features of a theme common to the four components of a promotion.

III. Color, Lettering and Design

The student should be able to:

- understand the use of color in the components of a promotion;
- understand and define terms descriptive of color qualities;
- construct a color wheel, given three primary colors;
- identify primary, secondary, and tertiary (intermediate) colors;
- identify and explain various color schemes;
- identify styles of lettering;
- explain the use of the styles of lettering in
- promotions;
- construct posters using styles of lettering appropriate to the theme;
- identify and define the principles of design;
- recognize and explain devices used in design;
- understand and explain arrangements used in design;
- combine for good effect, color, lettering, and design techniques and principles.

IV. Advertising

The student should be able to:

- define advertising;
- demonstrate a knowledge of the history of advertising;
- trace the evolution of advertising in marketing;
- understand the need for and the importance of advertising;
- relate advertising to mass production and mass consumption;
- identify the elements of an advertisement;
- apply appropriate elements to the preparation and layout of advertisements;
- write copy for advertising;
- develop a list of advertising appeals;
- demonstrate the ability to recognize and apply advertising appeals;
- identify and explain devices to attain advertising appeals;
- demonstrate the ability to use devices to attain advertising appeals;
- understand the importance of print media in advertising;

- identify the various types of print media;
- identify the features of each type of print medium;
- list and explain the advantages of the various types of print media;
- compare the rates of each type of print medium;
- identify the advertisers that use each type of print medium;
- identify the readers for whom each type of print medium is intended;
- design a flyer using print media;
- understand the importance of outdoor media in advertising;
- identify the various types of outdoor media;
- identify the features of each type of outdoor medium;
- list and explain the advantages and disadvantages of each type of outdoor medium;
- compare the rates of the various outdoor media;
- identify the advertisers that use outdoor media;
- design a poster for use as an outdoor advertisement;
- understand the importance of electronic media in advertising;
- identify the various types of electronic media;
- identify the features of the various electronic media;
- list and explain the advantages and disadvantages of each type of electronic medium;
- compare rates, times, and audiences for the various electronic media;
- identify the advertisers that use each of the types of electronic media;
- identify the viewers/listeners that use each of the types of electronic media;
- prepare an audio/visual script;
- understand the importance and application of other media in advertising;
- analyze the use of other media in advertising;
- appreciate the reason for ethics in advertising;
- recognize the importance of standards in advertising;
- develop an awareness of the influence of bilingualism and multiculturalism on advertising;
- identify the use of bilingualism in advertising;
- recognize the components of Canadian multiculturalism.

V. Special Activities for Promotions

The student should be able to:

- state and explain the purpose of special activities for promotions:
  a) create an activity to portray a desired image,
  b) identify ways to enhance goodwill,
  c) identify special activities to increase sales,
  d) identify ways of using special activities to improve morale;
- identify and explain the use of various types of activities;
- select and prepare appropriate activities for a given theme;
- analyze the effect of special activities on sales, image, goodwill and morale.

VI. Display

The student should be able to:

- define display;
- identify and explain the purposes of display;
- identify and explain the AIDA concept;
- plan a display on paper;
- understand the need for and the importance of window and interior displays:
  a) identify and explain the types of window displays,
  b) identify and explain the types of interior displays;
- understand the need for and the importance of lighting:
  a) describe the effect of lighting intensity on displays,
  b) identify and explain how colored lighting affects displays,
  c) demonstrate the effect of direct and indirect lighting,
  d) illustrate the tinting and shadowing techniques of lighting;
- understand the need for the preparation, use, and maintenance of props;
- identify the different types of props;

- understand the need for and the importance of planning a display;
- plan a display;
- construct a display;
- analyze and evaluate the effectiveness of a display.

VII. Personal Selling

The student should be able to:

- understand the need for and the importance of personal selling in marketing;
- develop an awareness of special preparations involved in personal selling:
  a) understand the need for salesmanship training,
  b) demonstrate good selling techniques,
  c) identify methods by which sales people are motivated,
  d) describe and evaluate remuneration incentives,
  e) relate personal selling to the promotional theme,
  f) identify other forms of personal selling,
  g) measure the effects of personal selling on promotion.

VIII. Customer Services

The student should be able to:

- identify and explain the need for and the importance of the various types of customer services;
- list various conveniences that a business may offer its customers;
- evaluate the impact of customer services on promotions.

RELATIONS IN BUSINESS 202

I. Personality

The student should be able to:

- define personality;
- understand the need for and the importance of personality development;
- identify and discuss factors that affect personality;
- identify and discuss characteristics of personality;
- describe how personality is affected by situations;
- define human relations;
- discuss the importance of and need for human relations;
- identify ways to improve the development of human relations;
- identify and describe business expectations of employees;
- identify and analyze ethics for employment;
- identify the outcomes of loyalty toward the employer;
- identify and assess aptitudes and abilities to determine self-worth and job satisfaction;
- develop an awareness of the influence of change on personality and job satisfaction.

II. Communications

The student should be able to:

- understand the need for and the importance of communications;
- define communications;
- identify and explain horizontal and vertical communication;
- identify and explain formal and informal communication;
- identify and explain business-client communication;
- demonstrate the ability and need to use internal business forms;
- identify and analyze promotions as a method of communication to the public;
- explain the relationship of senders, messages, media, and receivers in the communication cycle;
- recognize the need for and importance of feedback;
- understand the importance of timelines in communication;
- understand the importance of data processing to communication;
- identify and explain the use of various computer applications to communications.

III. Employer/Employee Relationships

The student should be able to:

- identify the opportunities and incentives provided by the employer;
- understand the purpose of a job description;
- describe the components of a job description;
- identify various systems of receiving pay;
- identify and explain the benefits commonly given to employees;
- understand the need for policies and rules;
- understand and appreciate the training offered by the employer;
- assess desirable physical and psychological working conditions;
- appreciate the advantages of effective guidance and leadership;
- identify personal needs;
- rank their needs in order of priority;
- match needs to a job description;
- match skills and knowledge to job expectations;
- understand the ethic of work for fair pay;
- understand and analyze employer regulations, rules and policies;
- develop an inventory of personal skills and knowledge;
- understand the importance of innovation and initiative for job advancement;
- identify the characteristics of proprietorship, partnership, corporation, cooperative, and crown corporation;
  a) identify employer-employee relationships in each;
- explain the difference between line, staff, line and staff, and committee structures:
  a) identify the employer/employee relationships;
  b) identify the employee/employee relationships;
- understand and explain the contractual relationship between employer and employee:

a) identify and explain the legal obligations of both parties,
b) describe the role of unions and associations.

IV. Employee/Employee Relationships

The student should be able to:

- identify personnel on an organizational chart;
- explain the relationships between personnel:
  a) discuss ethics within relationships,
  b) examine acceptable performance standards,
  c) identify communication channels;
- appreciate the need for congruency of goals and objectives;
- identify informal structures in an organization;
- examine the impact of personalties of individuals on employees;
- describe the importance of employee morale;
- demonstrate social skills in relations with others.

V. Customer/Salesperson Relationship

The student should be able to:

- develop an awareness of business policies and procedures that influence customer/salesperson relationships;
- analyze the effect of business policies and procedures on the customer/salesperson relationship;
- understand and explain the need for reasonable profits;
- appreciate the value of developing clientele;
- identify and explain ways of extending goodwill;
- explain factors that create business image;
- explain the target market concept;
- analyze the target group:
  a) list the psychographic dimensions of the target group,
  b) list the demographic dimensions of the target group;
- develop an awareness of customer needs for goods and services;
- develop an awareness of customer wants;
- understand the need for and the importance of honesty in business transactions;
- assess the customer's ability to buy;
- review and explain selling skills;
- understand the need for and the importance of product knowledge;
- match customer needs and wants to appropriate goods and services;
- explain how a salesperson creates goodwill;
- understand how the salesperson affects and conveys the business image;
- appreciate the need for ethics;
- understand the need for the salesperson to exercise good judgement;
- understand the relationship between the customer and the salesperson in various selling situations;
- understand the need for follow-up in the customer/salesperson relationship;
- identify methods to follow up;
- appreciate uses of follow-up data.

VI. Buyer/Vendor Relationships

The student should be able to:

- identify and explain the role of the buyer in a marketing function;
- identify various personnel who might act as buyers;
- prepare a job description for a buyer;
- understand the responsibilities of a buyer;
- understand and explain the techniques used by a buyer;
- explain the use of shows, exhibits, trips, and conventions;
- identify various job situations for buyers;
- understand the need for and the importance of the buying cycle;
- demonstrate the use of a buying cycle;
- list local vendors of retail merchandise;
- discuss the ethics and values common to a buyer-vendor relationship.

MANAGEMENT 302

I. Introduction to Management

The student should be able to:

- trace and explain the chronological development of scientific management:
  a) evaluate the impact of the Industrial Revolution,
  b) identify the contributions of the pioneers of management,
  c) identify and explain other factors influencing the development of management,
  d) identify and discuss the demographic changes in Canada,
  e) demonstrate an awareness of psychographic dimensions in Canadian society;
- identify the various emphases of management;
- identify and give examples of management schools of thought;
- construct a communication model:
  a) identify the various areas where communication may break down,
  b) apply the model to both business and personal communication.

II. Objectives

The student should be able to:

- understand the need for and the importance of objectives;
- compose objectives to develop logical thought patterns:
  a) write valid, reliable, measurable, and attainable objectives;
- evaluate objectives.

III. Ethics

The student should be able to:

- define and explain ethics;
- identify areas of ethical concerns;
- identify and examine factors influencing value systems;
- evaluate objectives in terms of probable outcomes and ethical implications;
- explain individual and social responsibilities in decision making.

IV. Decision Making

The student should be able to:

- identify and explain the steps in decision making:
  a) identify problems,
  b) gather data,
  c) identify alternatives,
  d) select an alternative,
  e) test and evaluate the selected alternative,
  f) execute the alternative,
  g) re-evaluate the results of the decision;
- identify other means of making decisions;
- develop an awareness of the application of decision-making theory to creativity in problem solving;
- understand the need for communication in the decision-making process.

V. Functions of Management

The student should be able to:

- define management;
- identify the components of the management cycle.

VI. Planning

The student should be able to:

- identify planning as a function of the management cycle;

- define planning;
- identify and explain the various types of plans;
- identify costs to implement plans;
- estimate expected dollar returns on investment;
- prepare cost analyses;
- prepare plans with time lines;
- estimate the probability of reaching goals;
- assess plans for their effect on people;
- develop an awareness of ethical implications in evaluation of plans;
- identify procedures, policies, and methods in existence;
- research the outcomes if no plans were made.

VII. Organizing

The student should be able to:

- identify organizing as a function of the management cycle;
- define organizing;
- identify and explain the various formal organizational structures;
- diagram and discuss the various types of formal organizational structures;
- identify and explain informal structures in an organization;
- identify and discuss ways in which the informal structures function in an organization;
- explain the purposes of a systems approach in organizing;
- identify and explain the criteria for a systems approach to organizational management;
- identify and explain Theory "X";
- identify and explain Theory "Y";
- identify and explain Theory "Z";
- explore modern theoretical models;
- identify and explain a communication model;
- diagram the flow of information in an organizational chart.

VIII. Directing

The student should be able to:

- identify directing as a function of the management cycle;
- identify and explain delegation;
- understand and explain the relationship between authority and responsibility;
- appreciate the need for accountability;
- understand the importance of unity of command;
- define motivation;
- identify the techniques of motivation;
- identify and rank personal goals;
- identify and explain organization goals;
- explain and evaluate the relationship between personal and organizational goals;
- develop an awareness of ways in which to evaluate the effectiveness of the directing function of management.

IX. Controlling

The student should be able to:

- identify controlling as a function of the management cycle;
- identify systems and procedures for controlling basic business operations;
- research systems and procedures for controlling basic business operations;
- prepare systems and procedures for controlling basic business operations;
- understand the relationship between management objectives and performance;
- compare current performance to the management objectives;
- define standard;
- understand the importance of standards in the controlling process;
- identify laws and codes that provide guidelines for controls;
- understand the need for and the importance of ethics;

- discuss the purpose of corrective action;
- evaluate systems and procedures used in the controlling process;
- determine the acceptability of results;
- replan to correct ineffective systems and procedures;
- identify types of support information for the control function;
- identify and understand the importance of budgetary and non-budgetary control supports.

X. **Leadership**

The student should be able to:

- understand the need for and the importance of leadership;
- identify the qualities of a leader;
- identify and explain various leadership styles.

MARKETING PRACTICUM 302

I. Planning Goals

The student should be able to:

- analyze the target market:
  a) develop a strategy for the analysis,
  b) construct and administer the measurement instrument,
  c) classify and sort the measurement data.
  d) report the findings of the analysis,
  e) prepare recommendations;
- plan an appropriate financial system for the budgetary control of funds:
  a) review the accounting system cycle, and the purposes of accounting,
  b) plan an accounting system/changes to suit a particular business' needs;
- plan an appropriate merchandise control system:
  a) understand the need for and importance of a merchandise control system,
  b) identify and categorize the type of service/merchandise to be sold by the business,
  c) plan a list of basic stock suited to the business,
  d) prepare a list of suppliers that sell the desired merchandise;
- prepare floor plans to identify the display and storage of merchandise;
- prepare a schedule of promotions;
- plan or justify general policies for the operations of the business;
- plan or analyze staff controls, job description, and scheduling for the business.

II. Organizing Goals

The student should be able to:

- design a financial/record-keeping system:
  a) identify the subsystems in financial control,
  b) design or analyze forms used in accounting,
  c) prepare a procedure to be used for financial systems;
- organize an accounting policy manual;
- design a merchandise control system:
  a) assign merchandise assortments to the floor plan,
  b) designate departments and merchandise to specific stock numbers,
  c) prepare a plan for the maintenance, storage, and uses of promotional materials;
- organize a merchandise policy manual;
- organize a policy manual for general administrative problems;
- formulate plans and controls for organizing staff duties, evaluation, and training.

III. Directing Goals

The student should be able to:

- delegate or record the responsibilities for controls to the accounting function;
- assign specific systems, subsystems, and duties to staff;
- delegate or record the responsibilities for controls to the merchandising function;
- assign specific duties to staff;
- delegate or summarize the daily routines for staff;
- delegate or record the responsibility for controls to the personnel function.

IV. Controlling Goals

The student should be able to:

- review or analyze the effect of financial control;
- review or record alternate measures to increase the efficiency in financial controls;
- summarize short-run and long-run results expected from the analysis of records;
- review the accounting manual and change policy where needed;

- review or analyze the effect of merchandise control;
- analyze the merchandise controls and prepare alternatives where needed;
- prepare a summary of short-run and long-run results expected from the analysis of records;
- review and/or change policies in the merchandise manual;
- justify the job descriptions through an analysis of personnel effectiveness;
- review and/or analyze the customer-handling procedures from a record of sales, complaints, and other feedback;
- review the personnel/administration manual and change policy where needed.

V. General Goals

The student should be able to:

- explore the effects of ethics in business;
- amalgamate the various systems and procedures found in the various departments of the business;
- report on the understanding of job requirements, duties, and potential opportunities;
- report on the effectiveness of using the managerial functions of planning, organizing, directing, and controlling.

VI. Practicum Delivery Systems (Options)

A. Store-Laboratory Management

The student should be able to:

- plans sales budgets and expense budgets;
- plan staff requirements;
- plan a promotional timeline;
- plan a series of promotional features;
- delegate daily cashier duties;
- delegate daily reconciliation duties;
- delegate daily banking duties;
- delegate markdown authorization;
- delegate daily housekeeping duties;
- delegate the preparation of display timelines;
- delegate promotions schedule and requirements;
- delegate periodic inventory taking;
- delegate periodic stock checks;
- evaluate daily sales activity by supervising the store-laboratory;
- evaluate daily sales reconciliations;
- evaluate bank reconciliations;
- review cheque handling procedures;
- evaluate the rate and nature of merchandise markdowns;
- supervise daily housekeeping;
- supervise and evaluate staff appointed to operation of the store-laboratory;
- evaluate displays in terms of technical excellence and goals;
- evaluate promotions in terms of goals;
- evaluate sales, expenses, and levels of inventory through the preparation of periodic income statements;
- evaluate growth through the preparation of a balance sheet;
- evaluate staff in terms of industry, initiative, punctuality, and conduct appropriate to the work place;
- prepare financial statements and reports for presentation.

B. Cooperative Work Education

The student should be able to:

- participate in the daily sales activities of cash register operation, charge sales, and personal selling;
- participate in housekeeping activities;
- report on the promotional events used by the host employer;
- participate in receiving functions;
- assist in marking merchandise;
- participate in stock-checking/inventory duties;
- report on the construction and use of displays;
- prepare display materials and promotional aids;
- evaluate a display;
- prepare an estimated sales budget for a significant time period;
- prepare an estimated expense budget for a time period equal to the time period for the sales budget;
- report on forms used in the accounting system, including a procedural flow-chart;
- report on the target market and the effectiveness of promotions to that group;
- report on the staff placement and job descriptions;
- report on the management viewpoint to evaluate staff;
- prepare a summary of the written reports.

c. Business Feasibility Seminar

THE STUDENT SHOULD BE ABLE TO:

- prepare an outline for the research report;
- conduct marketing research to prove the need for the proposed business:
  a) select a sample,
  b) construct a measurement instrument,
  c) develop a technique for using the instrument,
  d) test the instrument,
  e) revise the instrument,
  f) conduct the research;
- conduct a promotional and marketing mix for the proposed business;
- provide reports on the procurement and the cost of land, buildings, fixtures, capital, and inventories;
- prepare budgets to forecast financial activities:
  a) prepare pro forma statement of cash in-flow from all sources,
  b) prepare pro forma statement of cash out-flow from all sources,
  c) prepare a schedule of allowable depreciation of all assets for income tax purposes,
  d) prepare pro forma income statements for years one, two, and three,
  e) prepare pro forma balance sheets for years one, two, and three;
- prepare a set of accounting records:
  a) develop letterhead with name and logo,
  b) develop flow-charts for systems of merchandise control (sales), financial control (banking), and personnel review of staff and training,
  c) graph projected sales purchases, profits, depreciation, expenses, and cash flows over a three-year period,
  d) diagram break-even analyses for years one, two, and three;
- prepare an administrative policy manual;
- prepare a comprehensive report on the proposed business.

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retailing 102

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
I. PROGRAM AND COURSE INTRODUCTION		
A. Course Introduction		
The student should be able to:		
1. describe the history of marketing;	Trace the historical development of marketing: specialization, barter, craft guilds, industrialization.	
2. identify functions of marketing.	Emphasize the functions of marketing: selling, storing and transportation, buying, finance and risk-bearing, wholesaling, advertising and display, marketing research, and packaging. Prepare overheads and/or handouts to show how the four controllable variables (product, price, place, and promotion) depend upon the customer (McCarthy's "wheel" found on pages 22 and 32 of the text). Provide students with examples dealing with the five uncontrollable variables (cultural and social environment, resources and objectives of the firm, existing business situation, economic environment, and political and legal environment).	
B. Career Opportunities in Marketing		
The student should be able to:		
1. identify employer needs in the work place;	Have the students prepare a self assessment, an interest inventory, and a skills inventory by listing their personal likes/dislikes, needs, interests and goals, and abilities that would be of value to an employer. Have students match these self measurements to job descriptions and/or newspaper advertisements for jobs. Discuss how well each job suits them, and how well they would suit the job.	Refer to Canadian Classification and Dictionary of Occupations. The Index to Canadian Occupations (Kit), available from Canadian Government Publishing Centre, Supply and Services Canada, Hull, Quebec K1A 0S9.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. identify employee need satisfiers on the job;	Prepare a transparency and/or handout to show the employee need satisfies on the job. Refer to the SKILLS-NEEDS MODEL for the following explanation: The "individual" is considered as having both skills and needs. The goal to be accomplished is to match these to job skill requirements and need satisfiers. The degree to which a job satisfies one's needs determines whether one chooses to remain, or to quit. The degree to which the job requires skills determines whether one is promoted, transferred, dismissed or retained. Therefore, there are two criteria for tenure - being retained and/or choosing to remain. The options of promoting, transferring, being dismissed or quitting, ultimately lead to a new job.	Refer to Maslow's Hierarchy of Needs in Appendix B. Skills Needs Model, Appendix B
3. prepare for employment: (a) type a resumé, (b) obtain references,	Have the students prepare a resumé. Emphasize procedures for obtaining references.	Creating a Career Program, available from Canadian Government Publishing Centre, Supply and Services Canada, Hull, Quebec, K1A 0S9
(c) write letters of application;	Have students practice letters of application in answer to advertisements and for unadvertised positions.	
4. identify job opportunities in marketing;	Refer to newspapers, Canada Employment Centres, private employment agencies, personnel departments of companies. Prepare bulletin board displays and posters about employment opportunities. Arrange a workshop on Creative Job Search Technique through a Canada Employment Centre.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
5. identify job-entry opportunities in retailing and outline opportunities for advancement;		
6. identify careers available after receiving post-secondary education.	Refer to career sections of newspapers and to brochures and other career publications from community colleges and universities.	Calendars from community colleges and universities
II. CHECKER-CASHIER OPERATIONS		
A. Cash Register		
The student should be able to:		
1. understand the need for and the importance of checker-cashier operations;	Emphasize cash control, knowledge of merchandise, customer and checker-cashier relationship, advantage of the cash register. If students have access to a register, it may be used in demonstration. Otherwise, the students may study the handbook(s) prepared by cash register manufacturers.	ADVANTAGES OF A CASH REGISTER 1. Decreases accounting costs 2. Increases efficiency in recording and finalizing transactions 3. Provide business with needed records
2. use the correct procedures for recording a cash sale on a cash register;	Demonstrate the operation of the cash register. Have the students demonstrate each process in the operation of the cash register.	
3. make change;	Provide students with a list of techniques on making change. Provide drills for making change using the cash register, using role-playing with students as salesman and customers and using "money" for a more realistic situation.	RULES FOR MAKING CHANGE 1. Record the sale on the cash register. 2. Tell customer the total of sale and amount received from the customer. 3. Place the money on the change plate. 4. Count the change carefully. 5. Give customer change, receipt and merchandise.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
		6. Place the money in the cash register and close the drawer.
4. make a cash float;	Emphasize the importance of a cash float. Outline the procedures and records for establishing a cash float. Emphasize the cashier's responsibility to check the float for accuracy before accepting it. Contact local bank or supermarket for set up of coins and bills.	
5. record returns and adjustments;	Acquaint the students with the procedures and forms for processing returns and adjustments.	
6. handle cheques;	Outline procedures for processing cheques.	
7. handle other sales transactions:		
(a) fill out layaway forms,	Provide handouts and use overhead transparencies to discuss procedures and forms for layaways.	
(b) process charge sales,	Provide handouts and use overhead transparencies to discuss procedures and forms for charge sales.	
(c) process discounts and coupons,	Discuss the procedures and forms necessary for processing discounts and coupons.	Bulletin board displays of forms, coupons
(d) process credit card sales;	Discuss the procedures and forms. Obtain application form(s) for credit cards.	
8. calculate sales tax mentally, and by using a chart or the cash register.	Outline the purpose and regulations for sales tax. Discuss the procedures for calculating and processing sales tax. Have the students calculate sales tax.	Obtain information and charts for sales tax from Taxation Division, Norquay Building, 401 York Avenue, Winnipeg, Manitoba R3C 0P8.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
B. Additional Check-out Duties The student should be able to:		
1. understand the need for and the importance of a systematic check-out procedure;	Develop a job description and a model for check-out procedures applicable to a business. Contact various types of businesses for information about check-out procedures/duties.	Posters and handouts from cash register companies Bulletin board display or poster of procedures/duties
2. establish and maintain customer rapport and goodwill;	Discuss the purpose and components of company policy and services applicable to customers. Emphasize the importance of credibility through product knowledge, grooming, speech, and health of employees in establishing customer rapport and goodwill.	
3. demonstrate good ethics;	Define and discuss ethics . Discuss and list examples of acceptable conduct between business employees and customers. Use role-playing to experience ethical dilemmas in such cases as values conflicts, conflicts of roles, or pressure to conform.	Case studies Some views on the Issue of Business Ethics, available on loan from the Department of Education Library, Main Floor, 1181 Portage Avenue, Winnipeg, Manitoba R3G 0T3
4. replenish stock at the check-out station; 6. package merchandise for security and customer service; 7. obtain approval for cheques, returns and adjustments;	Discuss and prepare a list of procedures and tasks that would be appropriate for a check-out clerk. Have the students prepare bulletin board display(s) to show procedures for check-out duties, wrapping and packing, and cheque handling. Have the students demonstrate the procedures in a store-lab or role-play setting.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
8. perform other duties as assigned.	Develop list of requisite duties by analyzing school laboratory or by interview/observing a check-out cashier.	
III. RECEIVING AND MARKING MERCHANDISE		
A. Receiving Functions		
The student should be able to:		
1. understand the need for and importance of a systematic receiving procedure;	Have the students trace the flow of a specific item of merchandise from sources to retail outlets. Have the students trace the flow of merchandise from sources to the school. Have the students visit a receiving area at a large department store or supermarket and at a small store and have them prepare flow charts and describe in writing the functions of this area. Have the students describe the functions of the stock receiving area for the school. If students have access to a marketing laboratory, have them list the functions of receiving.	
2. develop a systematic receiving procedure;	Discuss and develop a systematic receiving procedure for the school. Where a marketing laboratory is used, prepare a check list for the receiving procedure. Discuss methods of checking merchandise: direct/indirect check; spot check; bulk check; and quality/quantity checks. Have the students check-in merchandise received in the school store or role-play a receiving procedure.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Emphasize these receiving and checking functions: - Unlock the receiving area door; - Supervise unloading of merchandise into piles of similar items; - Check the shipment to the bill of lading; - Approve the shipment (sign and note errors on the bill); - Retain a copy of the bill of lading, file and enter on the receiving log; - Relock the receiving area; - Move the shipment to marking areas.	Receiving Controls available on loan from the Department of Education Library, Main Floor, 1181 Portage Avenue, Winnipeg, Manitoba, R3G 0T3 Attempt to get "forms" from local cartage companies, or as used in a school store-lab if accessible.
3. identify and use the forms for the receiving function;	Provide examples and discuss uses of waybills, delivery receipts, bills of lading, packing slips, invoices. Have the students prepare a bulletin board/posters showing these forms. Flowchart the paper flow.	
4. identify the need for security;	Emphasize the need for security for all merchandise received, especially large volumes of merchandise.	Resource speakers from retailers/ wholesalers
5. understand the importance of moving merchandise to the proper storage areas;	Emphasize the importance of storage for control. Explain the location of reserve stock, under-the-counter stock, forward reserve stock, perimeter stock, warehouse stock.	
6. understand the need for cleaning the receiving area.	Emphasize the importance of safety and sanitation.	
B. Marking Functions		
The student should be able to:		
1. understand the need for and the importance of a systematic marking procedure;	Discuss and demonstrate marking procedures. Develop flowcharts for marking procedures.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. develop a systematic marking procedure;	Discuss and plan marking procedures for the school store and/or simulated marking procedures in class.	
3. process invoices and prepare claims;	Have students extend invoices, code costs, calculate unit costs, date merchandise, check accuracy of unit costing.	
4. identify various devices for tagging merchandise;	Conduct field trips, use films, or use store-lab equipment. Obtain and display examples of tags. Prepare bulletin board display, overhead transparency showing various tickets and information on tickets.	Literature from Monarch Marking Systems (Pitney Bowes)
5. prepare tickets for tagging merchandise;	Identify information found on tickets (date of receipt of merchandise, retail price, cost of merchandise, information for continuous inventory, style number, department number, etc.). Discuss reasons for using codes, other data required on tags, and use of machines. Discuss the problems of customers who switch tags on merchandise. Have the student research laws about price changes.	Refer to Sample Ticket in Appendix B.
6. identify and apply different marking systems congruent with different types of merchandise;	List the different types of marking systems. Give examples of merchandise for which each method would be desirable. Discuss marking versus non-marking, Universal Product Code, and legislation related to marking.	
7. demonstrate a knowledge of equipment used to prepare tickets;	Have students prepare tickets, lists, and schedules used for providing the prices for various types of merchandise.	Literature from Monarch Marking Systems (Pitney Bowes)

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
8. identify proper placement of tickets on different types of merchandise;	Emphasize consistency and care related to placing of tickets on merchandise.	
9. understand the need for displaying or storing ticketed merchandise in appropriate areas;	Discuss importance to customers and to sales people of displaying and storing ticketed merchandise.	
10. file business forms.	Emphasize the need to file business forms.	
	Have the students create a set of invoice files the marking function: - invoices ready for marking (extensions checked, unit cost calculated, and the ticket information recorded); - invoices marked but not charged to the purchases account; - invoices charged to the purchases account.	
C. Inventory The student should be able to:		
1. understand the need for and the importance of an inventory;	Visit store and warehouse facilities to view inventory and stock control methods.	
2. calculate the value of an inventory;	Have students value an inventory using cost/retail methods.	
3. identify and use inventory control methods;	Have a resource person speak to the class on inventory control, taking inventory, etc.	
4. identify and control shrinkage;	Discuss surveillance systems, good stock-keeping practices, store layout, store personnel.	
5. analyze shoplifting;	Explain significance of theft in terms of economic loss. Discuss the types of shoplifters and the causes of shoplifting.	SHRINKAGE: Any cause(s) of reducing the paper value of a merchandise inventory

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
6. explain shrinkage resulting from errors;	Explain and discuss the term "shrinkage", and list the causes of shrinkage with likely ways to control its effect of loss.	
7. compute turnover ratios.	Discuss turnover ratios.	TURNOVER RATIO: sales per period ($) / = average inventory ($)
IV. ANALYSIS OF TARGET MARKET		
A. Types of Customers		
The student should be able to:		
1. identify demographic dimensions for target market;	Pretest the class to determine the students' understanding of demographic and statistical terms.	
	Emphasize and discuss the following demographic dimensions: - population density; - family sizes; - sex, race, religion, etc.; - means of livelihood; - educational levels; - income distribution; - mobility; - age distribution; - geographical trade area; - other, such as housing, life expectancy, births, marriages, etc.	THE MARKETING MIX A. Controllable Variables 1. Product to be sold 2. Place of business 3. Price to be charged 4. Promotional mix to be used B. Uncontrollable Variables 1. Cultural and social environment 2. Economic environment 3. Existing competition 4. Political/legal environment C. Focus 1. The customer
	Work with students to develop a demographic survey on the chalkboard or on transparencies for the local trading area.	
	Prepare a demographic profile of the community school. Refer to the Marketing Mix by E. Jerome McCarthy and review the variables that determine the type of customer to be served.	(Source: E. Jerome McCarthy, 1969)

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. identify psychographic dimensions for target market.	Discuss the following psychographic dimensions for a target market: peer group pressure; custom; fashion; advertising; income (job types); and any other variables that come to bear upon the individuals' personal traits (heredity, etc.). Have the student draw a profile of a customer in terms of the psychographic dimensions, and describe the target market towards which a business would direct its appeal.	
B. Product Knowledge The student should be able to:		
1. understand the need for and the importance of product knowledge;	Discuss the importance of product information for all salespeople. Have the student locate product information from the following sources: manuals from manufacturers or company sources; leaflets shipped in packing boxes; trade association journals; government publications; consumer reports; labels; guarantees; advertisements; other salespeople; buyers; customers.	Publications from Consumer and Corporate Affairs Canada Marketplace - TV program
2. identify the characteristics of any product.	Have the student use sources of product information to research the characteristics of several products: uses of products, product features (size, quality, durability), product appeals, etc. Encourage students to describe to the rest of the class a product of their choice.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
C. Serving Customers The student should be able to:		
1. recognize customer needs and relate to product information;	Define and discuss retailing. Discuss reasons that people are in a store. Use bulletin boards, posters, and flip charts related to need satisfaction and to buying motives.	RETAILING Retailing is defined as satisfying customers' needs; the process of making goods and services available to ultimate consumers. Retailing helps to create time utility, place utility, and possession utility.
2. use product knowledge to assure customer of need satisfaction;	Use role playing to demonstrate product knowledge and to match the product to customer needs, including: - effectiveness of product; - advantages; - method of manufacture; - materials used; - quality and construction; - cost of upkeep.	
3. demonstrate good business ethics.	Discuss the relationship of ethics to meeting customer needs and in matching the product to these needs.	AIDA CONCEPT A ttract attention I nterest aroused D esire stimulated A ction to buy
D. The Customer The student should be able to:		
1. understand and apply the AIDA concept;	Identify the components of the AIDA concept: Attention, Interest, Desire, Action. Discuss these components in relation to customers.	
2. identify and analyze the needs and wants of customers;	Discuss the difference between needs and wants of customers. Use role playing to identify and to analyze the needs and wants of customers.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
3. list customers' buying motives;	Identify and discuss the buying motives related to physical and mental human needs and desires: rational buying motives, emotional buying motives, patronage motives, basic motives. Have students prepare posters/bulletin boards to illustrate buying motives including impulse buying. Plan discussion sessions devoted to analysis of products and services. Research buying preferences in stores. Prepare a list of products to satisfy rational buying motives. Identify, through discussion with customers, reason for buying. Prepare a list of products to satisfy emotional buying motives. Interview customers to determine why customers prefer to buy from one store in preference to others. Prepare a list of products to satisfy patronage buying motives.	<u>RATIONAL BUYING MOTIVES</u> 1. Efficiency 2. Economy 3. Durability 4. Time-saving potential 5. Ease of repair 6. Ease of installation 7. Simplicity of instruction 8. Adaptability 9. Brand preference <u>EMOTIONAL BUYING MOTIVES</u> 1. Health 2. Romance 3. Popularity 4. Companionship 5. Pleasure 6. Security 7. Pride of ownership 8. Social approval 9. Brand preference <u>PATRONAGE BUYING MOTIVES</u> 1. Dependability 2. Friendship 3. Reliability 4. Large assortment 5. Location 6. Image 7. Brand preference

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Suggest products that would satisfy basic buying motives.	BASIC BUYING MOTIVES 1. Self-preservation 2. Gain 3. Social approval 4. Convenience 5. Love 6. Pleasure 7. Variety 8. Curiosity 9. Fear
4. identify and explain buying decisions.	Emphasize, discuss, and explain five buying decisions of customers: - Why buy?---------- NEED DECISION - Type, brand, or style?------ ITEM DECISION - Where to buy?---------- PLACE DECISION - How much to pay?---------- PRICE DECISION - When to buy?---------- TIME DECISION	Consumer surveys reported in government documents, Consumer Reports, and articles found in household magazines
	Have the students conduct consumer surveys. Use taped interview for class replay.	
V. SELLING PROCESS A. Approach and Needs Determination	(As a culminating activity, have students videotape a selling process using the five steps of a sale).	
The student should be able to:		
1. identify the approaches;	Have students define and discuss the three approaches: greeting, service, and merchandise. Use shopping reports made by students to analyze the best use of each type of approach. Observe and record approaches used by salespeople for different types of products sold.	Sales Kit and Compentency-Based Practice Set (Selling) available on loan basis from the Department of Education Library, Main Floor, 1181 Portage Avenue, Winnipeg, Manitoba R3G 0T3 APPROACH The moment when the salesperson and the customer meet is the approach.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. understand the use of approaches;	Demonstrate approaches with a specific product. Have students demonstrate the approaches.	Guest speakers from retail and wholesale businesses
	Use a videotape/slides, etc., of salespeople and students using selling approaches (greeting, service, merchandise).	Field trips to retail businesses
3. recognize customer indicators of needs.	Discuss the indicators of customer needs: - customer who knows exact need or want; - customer who knows a general idea of need or wants; - customer who has need or want of which he is unaware.	
	Prepare a transparency, poster, or chart of the Five Steps in a Sale.	Refer to Appendix B, Five Steps in a Retail Sale.
B. Presentation		
The student should be able to:		
1. understand and demonstrate techniques for a sales presentation.	Have the student relate a presentation to customer needs.	
	Discuss ways of organizing a sales presentation imaginatively and logically using proper techniques.	
	Use role-playing applying sales techniques.	
C. Overcoming Objections		
The student should be able to:		
1. differentiate between sincere objections and excuses;	Define and discuss each of these terms: sincere (real) objections, excuses.	SINCERE OBJECTIONS: The understanding of rational resistance to buying

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Have students identify sincere(real) objections: price, manufacturer, product, salesperson, buying at present time.	EXCUSES: The irrational resistance to buying
2. turn excuses into sincere objections;	Have the students use role-playing applying the techniques of turning excuses into sincere (real) objections.	
3. demonstrate the ability to overcome sincere objections.	Discuss methods of offsetting objections and prepare posters or charts to outline these methods: - agreeing with customer; - presenting another viewpoint; - explaining objection; - admitting validity of objection; - asking questions to overcome objection; - presenting superior points.	
	Have the students use role-playing applying the techniques for overcoming sincere (real) objections.	
D. Closing the Sale		
The student should be able to:		
1. detect customer readiness to buy;	Have the students identify and discuss how to detect the readiness of the customer to buy: - looks pleased with an article; - shows interest in an article and appears annoyed with new articles; - shows signs of confusion, lack of interest, impatience; - comments about the article.	
2. identify methods for assisting the customer to make a choice;	Explain the psychology and effect of the following methods of guiding the customer toward a choice: - focusing attention on suitable articles; - removing articles of little/no interest; - offering opinion; - reviewing benefits to customer.	
3. review the needs of the customer and match them to the merchandise;	Have the students describe and demonstrate how they would offer substitute merchandise to customers.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
4. close the sale or repeat the selling process.	Have the students observe sales personnel closing sales. Identify points where closing statements or techniques could have been employed. Describe various sales situations step-by-step, and ask students to identify the most logical point(s) where a closing statement or technique might be employed. Have the students develop lists of closing statements for products and services. Give a sales demonstration or have a student give a sales demonstration and have the class use a cooperatively developed checklist to grade each step of the closure to the sale.	
E. Suggestion Selling The student should be able to:		
1. identify the principles of suggestion selling;	Identify and discuss the following principles of suggestion selling: - better quality merchandise; - complementary merchandise; - substitute merchandise.	
2. demonstrate the principles of suggestion selling.	Use role playing/video tape to demonstrate the principles of suggestion selling. Have three groups within the class select either better quality, complementary, or substitute merchandise as the basis for suggestions.	Speaker and/or demonstration by a professional salesperson/sales manager

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
F. Special Selling Techniques The student should be able to:		
1. identify and explain special selling techniques;	Have the students list and discuss the following special selling techniques: - franchise; - direct selling (door-to-door, route); - automatic vending; - telephone; - catalogue; - self-serve. Have the students analyze the community and prepare a list of categories of stores: - single-line stores; - department stores; - fashion stores; - shopping centres; - boutiques; - factory outlets. Discuss the special selling techniques applicable to these categories.	
2. demonstrate the ability to use the techniques for door-to-door and telephone selling;	Have students participate in a school project (e.g. solicit advertisements for school yearbook or assist with a fundraising drive). Contact the Manitoba Telephone System for equipment for classroom use.	The Story of the Yellow Pages, kit, available on a loan basis from the Department of Education Library, Main Floor, 1181 Portage Avenue, Winnipeg, Man. R3G 0T3
3. explain and diagram selling by computer system.	Conduct research pertinent to selling by computer system. Have students flow chart a computerized system and prepare a bulletin. board/poster of the flow chart.	Literature about the IDA project from Manitoba Telephone System

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
G. Special Sales Forms		
The student should be able to:		
1. identify and explain the special sales forms;	Obtain sample forms from business, or from personal use, or from Appendix A: Handbook of Forms.	
	Identify the forms and discuss the purpose of each form. Have students create posters of the forms.	
2. demonstrate the ability to use special sales forms.	Have the students complete these forms accurately: - sales bills for various types of sales; - sales slips and cash register receipts; - tally cards (used to total the sales from sales slips).	
H. Sales and Business Image		
The student should be able to:		
1. define and understand the need for business image;	Discuss the importance of a business image. Invite a speaker from a specialty shop to address the class.	
2. project and maintain a business image with the target market;	Identify and discuss elements involved in projecting and maintaining a business image: - merchandise policies related to customers; - sales promotion and selling policies related to customers; - customer service policies; - store layout and fixture policies.	
3. define goodwill;	Discuss ways by which businesses establish goodwill: community participation, free delivery, credit facilities, provision of amenities, gratuities to clubs, schools, and service groups, etc.	
4. define and discuss the concept of clientele;	Discuss methods by which a business can establish and maintain clientele.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
5. handle customer complaints.	Identify and discuss customer complaints. Discuss methods of handling complaints of customers. Use role playing/simulations to deal with complaints of customers. Emphasize the relationship of handling customer complaints to establishing and maintaining business image, goodwill, and clientele.	DEFINITIONS IMAGE - what others believe to be true about a business GOODWILL - the value that a business places on its clientele CLIENTELE - the habitual customers of a business
VI. DISPLAYS		
A. Types of Displays		
The student should be able to:		
1. understand the purpose and the importance of the different types of displays;	Explain the role of displays in modern retailing: - Relate display promotion to desired store/ business image; - Explain how promotion by displays should take the interests and characteristics of customers into account; - Describe the location and neighbourhood factors that will affect the success of any promotion by displays.	
2. classify types of displays.	Identify, explain, and list the types of displays: promotional, institutional, window, interior, exterior, point-of-purchase.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
B. Techniques The student should be able to:		
1. identify the basic components of displays;	Identify, explain, and list the basic components of displays. Have students prepare a portfolio to incorporate color, design and theories associated with displays. Use this portfolio as the basis for analysis and development of displays both in and out of the school setting.	COMPONENTS OF DISPLAYS . Arrangements - Timeliness . Lighting - Use of Colour . Cleanliness - Technical Excellence . Selling power - Power to attract attention
2. demonstrate the ability to use the following techniques in preparing displays:	Have the students use the basic components to build models of displays: paper models, window display model.	
(a) apply the psychology of colour,	Discuss how the use of colour affects display: - psychology; - hue, value, intensity; Explain and use the colour wheel. Prepare poster/transparency of the colour wheel. Use demonstrators and speakers from the art departments in schools, community colleges, and/or businesses.	Refer to the "Colour Wheel" in Appendix B.
(b) prepare showcards and posters,	Use felt markers, poster paint and brushes, or letter stencils to prepare showcards and posters. Use opaque projector to develop a set of the letters in the alphabet; cut out and trace on cardboard as required.	
(c) apply the principles of design,	Define, discuss, and use the four design principles: composition, dominance, balance, and proportion.	FOUR PRINCIPLES OF DESIGN 1. Composition 2. Dominance 3. Balance - formal - informal 4. Proportion

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
(d) use lighting effectively,	Discuss the correct use of lighting to enhance displays: - effect of light on colour; - use of light for emphasis.	
(e) select and use arrangements congruent with merchandise.	Discuss the importance of matching the display and the merchandise in terms of uses of merchandise, textures, colours, line, shape, and timeliness of the appeal.	
C. Purposes The student should be able to:		
1. create displays for specific promotions;	Have the students plan, discuss, and prepare displays for Hallowe'en, Christmas, Easter, $1.44 Day, etc.	
2. plan for the location of displays for maximum appeal;	Explain the importance of locating displays to create a business image, to build goodwill, and to attract customers.	
3. evaluate displays based on specific criteria.	Explain factors to consider in critically evaluating displays: suitability, power to attract, selling power, arrangement, cleanliness, lighting, technical excellence. Develop a rating guide or use a prepared guide. Arrange trips to view displays for specific promotions. Invite guest speakers to discuss promotional displays.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
VII. BUYING	Invite a guest speaker to discuss the importance of buying decisions. Prepare a chart/transparency of the principles underlying good buying policies. Have students discuss and provide examples for each principle.	PRINCIPLES FOR BUYING POLICIES 1. Objectives of store 2. Choice of vendor(s) 3. Frequency of buying 4. Use of distribution centres 5. Assortment carried in stock 6 Customers' wants 7. Type and quality of merchandise 8. Available funds for inventory investment 9. Knowledge, experience, preference of buyer 10. Business conditions 11. Seasonal, cyclical variations 12. Community needs (culture, values, etc.)
A. Buying Decisions The student should be able to:		
1. distinguish between stock checks and inventories;	Define and discuss stock checks and inventories.	STOCK CHECK - a count of merchandise for the purpose of determining the rate of sale based on sizes, colours, and other categories. INVENTORY - a count of merchandise for the purpose of determining the dollar paper-value of goods on hand for resale.
2. perform a stock check;	Discuss procedures and methods of performing stock checks. Have the students carry out stock checks of merchandise in the school laboratory, or of objects in the classroom. Arrange a field trip to view procedures used for stock checks.	
3. prepare orders based on stock records;	Have students fill out purchase orders for a number of items needed according to the stock check.	Bulletin board display of forms used by business

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
		See Appendix A for forms suggested for store laboratories for stock-book sheets and inventory sheets.
4. describe the effects of seasonal cycles on business purchasing decisions;	Identify the different seasons related to purchasing of merchandise Emphasize the necessity of purchasing prior to the various seasons in order to achieve the following: - right merchandise; - in right place; - at right time; - in right quantity; - at right price. Prepare overheads/posters to illustrate these goals. Develop a flow chart and/or graph for seasonal purchasing.	
5. locate suppliers;	Use the telephone, telephone directory, stock control books, trade publications, store records, and other store-lab resources to create a list of probable suppliers. Have guest speakers explain methods for dealing with suppliers. Have students prepare merchandise resource file cards, or develop an index of suppliers for use as an appendix to the stock-book.	
6. distinguish between consignment buying and memorandum buying.	Define consignment buying and memorandum buying. Explain under what circumstances a buyer would purchase on memorandum and/or consignment.	CONSIGNMENT BUYING - goods remain the property of the vendor until they are retailed. The merchant is responsible for all goods not on hand, and pays for inventories after they are sold.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
		MEMORANDUM BUYING - goods are the property of the merchant. Unsold inventories may be returned for credit.
B. Buying Procedures		
The student should be able to:		
1. understand the need for and the importance of a systematic buying procedure;	Discuss the relationship of buying procedures to the preparation of a plan for buying. Explain the advantages of a buying plan, and evaluate its use for large/small stores.	ADVANTAGES OF A BUYING PLAN 1. Makes stock turnover more efficient 2. Provides lead time for purchasing 3. Accommodates seasonal variations 4. Accounts for store size
	Take the class through the steps in establishing a basic stock.	
	Create stock-book(s) and identify those items of merchandise that would be considered Basic Stock, and those that would be Supplementary Stock.	DETERMINING BASIC STOCK 1. Research the customer for basic needs. 2. Estimate the quantities of items needed to satisfy customer needs. 3. Estimate the quality of items to satisfy customer needs: - colour; - size; - price range; - styles; - brand. 4. Estimate the timeliness of the merchandise: - minimum quantities that demand reordering; - lead time necessary for receiving orders; - schedule for stock-checks.
	Develop charts/transparencies for the steps in determining a model for buying and a basic stock.	
	Discuss buying plans for staple merchandise, fashion merchandise, seasonal goods and short term buying.	
	Assign each student or pairs of students to create a basic stock for a store.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. prepare purchase orders from stock checks and other objective data; 3. update the stock; 4. understand laws related to buying; 5. list services provided by suppliers; 6. demonstrate good business ethics; 7. identify and distinguish between the various delivery procedures;	Obtain and discuss forms used for buying: pro-forma orders, purchase orders, stock-book sheets. Make transparency masters of the forms. Give students practice in completing forms with special emphasis on handwriting, numbers, and accuracy rather than the procedure. Discuss reasons, responsibilities, and procedures related to updating the stock, reordering, and the use of forms. Explain the legal restrictions related to the purchase of goods. Determine when title transfer of merchandise being transported occurs. Discuss the legal aspects of a purchase order, misunderstandings in the form of incorrect goods, late shipments, and problems caused by carelessness in writing orders. Have students identify and discuss the parts of a purchase order. Arrange field trip to wholesalers. Invite salesmen to speak to students. Discuss ethics in relation to returns, damages, claims, overages. There are enough different modes of transportation of goods so that the class can form committes or work in pairs to investigate and report on them. Students should consider costs, speed of delivery, weight of items to be shipped, local handling, reputation of carrier.	Law textbooks TITLE TRANSFER OPTIONS 1. F.O.B. factory 2. F.O.B. destination 3. On memorandum agreement 4. On consignment agreement Purchase order samples obtained from a business or school Examples of forms for returns, damages, claims, overages MEANS OF TRANSPORTATION 1. Railroad 2. Trucks 3. Airplanes 4. Bus 5. Barge or ship 6. Postal service 7. Rental vehicles 8. Courier service 9. Pipelines 10. Tractor trains

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GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Discuss these legal aspects related to transportation: 1. Who is responsible for transportation costs? 2. Who has title when the goods are in transit? 3. How shipped? 4. How packaged? 5. How and when does title pass?	Law textbooks
8. follow-up on completion and delivery of orders.	Discuss the importance of follow-up procedures. Have students flow-chart a system to file forms, process claims, and prepare correspondence/forms for backorders, errors, etc.	
C. Related Buying Topics		
The student should be able to:		
1. diagram distribution channels;	Provide charts for and discuss common channels of distribution.	
	Prepare diagrams of the channels of distribution.	
2. explain the advantages and disadvantages of buying through brokers, agents, and groups;	Define the terms brokers, agents and groups.	
	Have the students develop comparative charts of the advantages and disadvantages for each.	
3. prepare charts to illustrate fashion cycles for specific merchandise;	Have the students prepare the charts for a minimum of three different types of merchandise.	Refer to Appendix B, "Fashion Cycles".
4. describe the relationship between wholesaling and retailing;	Review the channels of distribution. Have students compare and contrast the goals of wholesalers/retailers.	BUYER'S JOB DESCRIPTION 1. Identifies consumer needs 2. Identifies suppliers 3. Develops a buying plan 4. Negotiates for merchandise 5. Submits the order 6. Uses data processing, manual and/or electronic 7. Reports to and consults with merchandise manager/department manager
5. explore career opportunities in buying.	Discuss the major functions of a buyer. Explain the duties of buyers in large stores, department stores, and specialty shops.	
	Have the students interview buyers to obtain information about their duties and education/training.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
D. Wholesaling The student should be able to:		
1. identify the functions and purposes of a wholesaler;	List and discuss the functions and purposes of a wholesaler: buying, selling, dividing or bulk breaking, financing, risk bearing, management services. Have students compare these to the functions of marketing previously discussed.	
2. describe the customer services that a wholesaler might provide;	Emphasize the importance of good relations with customers through the development of services that customers require. Have students prepare poster(s) to outline the services that wholesalers offer to customers.	<u>WHOLESALER SERVICES</u> 1. Prompt delivery 2. Merchandising aids 3. Financing retailers' purchases 4. Cooperative advertising 5. Sample rooms 6. Demonstrations 7. Technical assistance
3. discuss the principal elements of wholesaling promotional strategies;	Visit a wholesale establishment. Invite a guest speaker from a wholesale establishment to discuss wholesaling promotional strategies. Have students request sample forms used by wholesalers to assist their storage, billing, and shipping functions. Prepare posters/bulletin boards to illustrate the process and flow of forms.	<u>Understanding Wholesaling</u> kit, available on a loan basis from the Department of Education Library, Main Floor, 1181 Portage Avenue, Winnipeg, Man. R3G 0T3. <u>WHOLESALER'S PROMOTION</u>
4. discuss and explain the appropriate methods of shipping, moving, and storing merchandise in a warehouse;	Discuss methods of shipping. Arrange field trips to warehouse and storage areas in supermarkets, wholesale grocers, department stores, small stores, grain elevators.	1. Conduct research 2. Identify sources of supply and new products 3. Prepare catalogues 4. Advertise 5. Use direct mail
5. identify career opportunities in wholesaling.	Identify and discuss types of careers available and the training programs available.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
		EXAMPLES OF WHOLESALERS 1. Wholesalers for manufacturers 2. Brokers 3. Rack jobbers 4. Grain elevators operators 5. Commission merchants 6. Auctioneers 7. Assemblers 8. Petroleum dealers
VIII. PRICING A. Pricing Decisions The student should be able to:		
1. prepare pro forma invoices;	Provide examples of pro forma invoices. Discuss the importance of pro forma invoices in relation to the pricing of merchandise, and the timeliness of offering it for sale.	Appendix A, Handbook of Forms
2. understand the influence of competition;	Discuss the relationship of competition and pricing. Provide or have the students prepare a comparison shopping report form. Have the students comparison-shop in a number of stores and report to the class on the retail prices of a given list of common items of merchandise. Research grocery advertisements to examine pricing strategies.	COMPARISON SHOPPING REPORT FORM Store_____ Name of Item_____ Quantities/Brands/Styles carried_____ Price Ranges_____ Assortment (wide or narrow)_____ Comments_____ Daily newspapers and flyers

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
3. apply related concepts of mathematics;	Identify and explain the mathematics of prices: markups, markdowns, and discounting.	Textbooks for business mathematics
4. express all costs as a percent rate of sales;	Explain why all costs should be expressed as a percent rate of sales: - Expenses, profit, etc., are commonly expressed as a percent rate of sales; - Markup expressed this way can be compared with markup figures in other stores.	Mathematics drills and problems to calculate costs as a percent rate of sales, available in business mathematics texts
5. understand the basis for establishing a reasonable markup on merchandise.	Have the students identify and discuss the factors which determine retail prices and how they influence retail prices. Discuss the purposes of markup on merchandise.	FACTORS AFFECTING RETAIL 1. Costs 2. Desirability 3. Customary price 4. Competition 5. Government 6. Trends
B. Pricing Procedures The student should be able to:		
1. understand the need for and the importance of a systematic pricing procedure;	Invite buyers to class to discuss pricing strategies and procedures for their businesses in particular, and some generalities which may apply to pricing strategies and procedures. Identify and explain the importance of pricing goals to overall marketing goals.	PRICING GOALS 1. Return on investment 2. Share of the market 3. Stability of prices 4. Customer appeal 5. Price alignment
2. demonstrate the use of a profit meter;	Explain the purposes and use of the profit meter - an instrument which computes accurately the percent rate of profit on the selling price. Have students make profit meters from cardboard using a transparency of the model provided. By aligning the two discs of cardboard with centered holes and fastening with a rivet or pin, a profit meter can be constructed.	Refer to Appendix B, "Profit Meter"

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
3. calculate the relationships between revenues (sales), costs, and profits:	Explain the purpose and use of a break-even analysis in establishing and analyzing pricing procedures.	Refer to Appendix B, "Break-Even Analysis".
(a) prepare a break-even analysis,	Discuss a model for a break-even analysis and have students develop a break-even analysis from given data.	
(b) prepare a simple merchandise income statement;	Explain the major components of an income statement. Have students construct income statements from given case studies. Have students construct break-even analysis graphs from an income statement so that they learn the relationships between the two forms of analysis.	
4. calculate markup on retail value of merchandise;	Discuss the relationship of the calculation of markup to retail pricing strategies and procedures.	
	Explain the method of calculating markup.	Refer to business mathematics textbooks.
	Calculate markup based on data from the school store and/or from case studies.	Markup tables
5. calculate markdown on retail value of merchandise.	Discuss the relationship of the calculation of markdown to retail pricing strategies and procedures.	
	Explain the purpose and causes of markdowns.	PURPOSE OF MARKDOWNS 1. Speed up sale of goods 2. Lure customers into the store 3. Clear slow-moving merchandise
	Explain the method of calculating markdown.	
	Calculate markdown based on data from the school store and/or from case studies.	Refer to business mathematics textbooks.
C. Techniques and Uses The student should be able to:	Identify and explain the purposes and uses of techniques in developing pricing policies.	PRICING POLICIES 1. "One fixed price" (marked on tickets)

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
		2. Price lining (categorizing prices) 3. Multiple pricing (e.g., 2/79¢) 4. Loss-leader pricing (e.g., 2 for] sale) 5. Irregular pricing (e.g., 88¢)
1. understand the use and effect of loss leaders;	Explain loss leaders, leader pricing, and the purpose of loss leaders. Arrange a field trip to grocery stores and/or shopping centres to identify the use of loss leaders. Use the concept of loss leaders in the school store or in classroom exercises.	Newspaper advertisements for groceries
2. demonstrate the ability to establish multiple pricing for merchandise;	Explain the purpose and method of establishing multiple pricing.	Drill sheets for multiple prices as found in business mathematics textbooks
3. establish discounts;	Define <u>discounts</u>. Discuss the purpose of discounts in retail pricing. Explain the method of establishing discounts and of accounting for them. Apply the principle of establishing discounts to the school store or to classroom exercises.	Logan and Freeman, <u>Mathematics in Marketing</u> Mathyk, <u>Working with Cash</u> Refer to Appendix A, Markdown Sheet <u>DISCOUNTS DEFINED</u> Discounts are reductions in retail to compensate for reduced value or to extend a gratuity to a customer.
4. develop the ability to apply price lining to pricing merchandise.	Define <u>price lining</u>. Discuss the purpose of price lining in developing pricing policies. Apply the principle of price lining to establish retail pricing for the merchandise in the school store or in classroom exercises.	

CORRELATION OF COURSE CONTENT WITH SUPPORT MATERIALS

COURSE CONTENT	APPROVED TEXTBOOKS		OTHER REFERENCES
	Richert et al. Retailing Principles and Practices	Taller, T. Introductory Marketing: A Retail Perspective	
I. PROGRAM AND COURSE INTRODUCTION			
A. Course Introduction	Unit 2, Part 5	Chapters 1, 2, 5	Marketing, Sales Promotion and Advertising, Nolan et al
B. Career Opportunities in Marketing	Unit 1, Parts 1, 2, 3 Unit 8, Parts 23, 38 Unit 13, Part 38	Chapter 8	Marketing 1, Fraser
II. CHECKER - CASHIER OPERATIONS			Basic Marketing: A Managerial Approach, McCarthy
A. Cash Register	Unit 4, Parts 10, 12 Unit 10, Parts 28, 29, 30	Chapter 5, Part 2	Working with Cash, Mathyk Marketing, Fraser
B. Additional Checkout Duties	Unit 2, Part 4 Unit 4, 11, 12 Unit 3, Part 8 Unit 15, Part 44	Chapter 7	Working with Cash, Mathyk Marketing 1, Fraser
III. RECEIVING AND MARKING MERCHANDISE			
A. Receiving Functions	Unit 5, Part 13	Chapter 6	Jeffrey's Department Store, Koeninger, et al.
B. Marking Functions	Unit 5, Part 14	Chapter 6	Jeffrey's Department Store, Koeninger, et al.
C. Inventory	Unit 5, Parts 14, 15	Chapter 6	

COURSE CONTENT	APPROVED TEXTBOOKS: Richert et al.	APPROVED TEXTBOOKS: Taller, T.	OTHER REFERENCES
IV. ANALYSIS OF TARGET MARKET			
A. Types of Customers	Unit 2, Part 5 Unit 14, Parts 41, 42	Chapter 10	Marketing 1, Fraser Basic Marketing, McCarthy Jeffrey's Department Store, Koeninger
B. Product Knowledge	Unit 4, Part 26		
C. Serving Customers	Unit 2, Part 5 Unit 8, Parts 22, 23	Chapter 7	Jeffrey's Department Store, Koeninger
D. The Customer	Unit 3, Part 7 Unit 8, Parts 22, 23, 24 Unit 9, Part 25	Chapter 7	Marketing 1, Fraser
V. SELLING PROCESS			
A. Approach and Needs Determination	Unit 3, Part 7 Unit 9, Part 25	Chapter 7	Marketing 1, Fraser
B. Presentation	Unit 3, Part 8	Chapter 7	Marketing 1, Fraser
C. Overcoming Objections	Unit 9, Part 26	Chapter 7	
D. Closing the Sale	Unit 3, Part 9	Chapter 7	Marketing 1, Fraser
E. Suggestion Selling	Unit 3, Part 9	Chapter 7	Marketing 1, Fraser
F. Special Selling Techniques	Unit 15, Part 45		
G. Special Sales Forms	Unit 4, Part 10		
H. Sales and Business Image	Unit 11, Part 31		Marketing 1, Fraser

COURSE CONTENT	APPROVED TEXTBOOKS: Richert et al.	APPROVED TEXTBOOKS: Taller, T.	OTHER REFERENCES
VI. DISPLAYS			
A. Types of Displays	Part 17	Chapter 9	Display Planning and Techniques, Samson and Little Marketing, Sales Promotion and Advertising, Nolan Marketing 2, Fraser
B. Techniques	Suggested References	Chapter 9	Marketing, Sales Promotion and Advertising, Nolan
C. Purposes			
VII. BUYING			
A. Buying Decisions	Unit 23	Chapter 5	Marketing 1, Fraser
B. Buying Procedures	Unit 23	Chapter 5	
C. Related Buying Topics	Unit 8, Part 23 Unit 33	Chapters 1, 5	Marketing, Sales Promotion and Advertising, Nolan Marketing 1, Fraser
D. Wholesaling	Unit 33		Wholesaling and Physical Distribution, Ertel and Walsh Marketing in Action, Warmke et al.
VIII. PRICING			
A. Pricing Decisions	Suggested References	Suggested References	Mathematics in Marketing, Logan and Freeman Working with Cash, Mathyk
B. Pricing Procedures	Unit 22, Part 65, 66		Retail Business Management, Gillespie and Hecht
C. Techniques and Uses	Unit 22, Part 65		Mathematics in Marketing, Logan and Freeman Working With Cash, Mathyk

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GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
I. INTRODUCTION A. Purpose of Promotions The student should be able to: 1. understand the need for and the importance of promotions in marketing:	Define promotions. Discuss the function of promotions as a part of the marketing process. Have students report on activities that help to increase sales and/or promote goodwill and image. List the advantages of using promotions to increase sales. Speculate on the extent and quality of business activity if no promotion is used.	PROMOTION A promotion is any activity designed to increase sales and/or to promote image and goodwill. Introduction to Promotion, a kit, available from the Department of Education Library, Main Floor, 1181 Portage Avenue, Winnipeg, Manitoba R3G 0T3
2. recognize the necessity of developing and maintaining one theme in a promotion;	Emphasize the importance of developing one theme in any promotion. Have students identify how one theme is useful in providing a focus for the promotion. Discuss the use of the one-theme approach in business promotions, and provide examples of words, colors, symbols, letter-styles, or other theme criteria.	
3. identify the four components of a promotion.	List and discuss the four components of a promotion: - advertising, - special activities (contest, fashion shows, publicity), - display, - personal selling. Divide the class into groups that study how the activities of each of the four components of a promotion makes a contribution to a business. Hold a debate as to the relative importance of advertising, special activities, display, and personal selling.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
II. ONE THEME FOR PROMOTIONS A. Aims and Objectives The student should be able to: 1. demonstrate a knowledge of the aims and objectives of a theme.	Discuss the aims and objectives of a promotional theme. Discuss the aims and objectives of specific promotional activities which are obvious in the local community. Select a national or local promotional event (eg. Bay Day, $1.49 Day, or Woolco's $1.44 Day) and identify the theme, its aims and objectives.	THEME DEFINED A promotional theme consists of lines, shapes, colors, textures, words, and other images that unify the components of a promotion.
B. Types of Themes The student should be able to: 1. identify the types of themes that promote goods and services; 2. identify the types of themes that create goodwill.	Have the students locate examples of types of themes in newspapers, T.V., or magazines. Identify which of these themes promote the sales of goods and services. Have the students identify the recurring theme used in all components of the promotions (colour, shapes, logos, lines, slogans, textures, words, etc.). List and discuss themes that create goodwill. How are these different from themes that sell goods and services? Have students identify the appeals used in the themes. Encourage students to use the one-theme approach for school events and the school store laboratory.	EXAMPLES OF PROMOTION THEMES Goods and Services. - Bay Day - Trans-Canada Sales - $1.44 Day - Mother's Day - Easter - Christmas Goodwill and Image - Graduation - Career Day - Awards Day - Remembrance Day - (fund raising in schools) - (community services)

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
C. Costs and Resources The student should be able to: 1. develop an awareness of the need for resources and budgets to prepare a promotion.	Discuss costs related to developing a promotion. Itemize the costs associated with each of the four components. Emphasize the influence of these costs on, and the need to include these costs in, a budget. Have the student prepare an inventory, catalogue, and cost of the promotional materials available in the school store laboratory.	
	Arrange a field trip to advertising departments of shopping malls and large stores. Invite an owner or manager of a business to talk about resources and budget for promotions. Have students provide reasons why more money should be spent on one promotional activity than another in a given promotion.	TARGET MARKET DEFINED A target market is that particular group of customers to whom a business wishes to appeal. THE MARKETING MIX A. Controllable Variables 1. Product to be sold 2. Place of business 3. Price to be charged 4. Promotional mix to be used B. Uncontrollable Variables 1. Cultural and social environment 2. Economic Environment 3. Existing competition 4. Available resources and goals 5. Political and legal environment C. Focus 1. The customer (SOURCE: E. J. McCarthy, 1969)
D. Market Analysis The student should be able to: 1. define the target market concept;	Use discussion as a means of having the students define and give examples of target markets. Discuss the ways in which a particular group of customers can be identified as the "target market".	
2. determine the target group: (a) list the psychographic dimensions of the target; (b) list the demographic dimensions of target group;	Discuss the psychographic dimensions in relation to the target market. Have students discuss the ways in which heredity, values, customs, cultures, and other personal variables affect the nature of a target group.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
3. emphasize the product or service features that appeal to the target group.	Discuss the demographic dimensions of a target market. Have students review a portion of the marketplace in terms of socio-economic status, marital status, age, sex, education, occupation, and other demographic variables. Have students identify products/services that would likely appeal to target groups that have been analyzed.	
E. Components of a Promotion The student should be able to:		
1. identify the one theme that ties the four components together.	Discuss the use of one-theme approach in combining the four components of promotion: advertising, special activities, display, and personal selling. From newspapers, magazines, and/or T.V. sources, have students identify the theme that is common to a promotion's components.	
F. Components of the Theme The student should be able to:		
1. identify the features of a theme common to the four components of a promotion.	List and discuss the features of a theme used throughout the four components of a promotion (colour, slogans, words, logos, type style, merchandise appeals, symbols, line, textures, shapes, etc.) Construct a bulletin board display to illustrate these components and the one theme used. Use examples of advertisements and/or displays to analyze the features used in a theme. Have students report on the theme(s) used in a major local sales promotion ($1.44 Day, Mother's Day etc.).	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
III. COLOUR, LETTERING AND DESIGN A. Colour The student should be able to:		
1. understand the use of colour in the components of a promotion;	using the example of a promotion, have students evaluate their understanding of the use of color in T.V., displays, and print media. Bring copies of fliers and magazines to the classroom and have students mount on posters examples of the seven uses of color. Have the students analyze the advertisements on a colour T.V. set in the classroom.	SEVEN USES OF COLOUR 1. To provide psychological impact 2. To depict customer preference 3. To assist illusions 4. To gain attention 5. To enhance legibility of words 6. To promote artistic value 7. To emphasize illustrations (Re: Nolan, 1965, pp. 307 - 313)
2. understand and define terms descriptive of colour qualities;	Gather examples from coloured magazine advertisements that show the use of hue, tint, shade, tone, value, intensity, warm colours, cool colours, advancing colours, and receding colours. Have students prepare posters/bulletin boards of these terms using samples from magazines.	COLOUR TERMINOLOGY Hue - colour Tint - any colour with white added Shade - any colour with black added Tone - any colour with white and black added Value - the lightness or darkness of a colour

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
		Intensity - the purity, strength or saturation of a colour Warm colours - those colours ranging from red-violet through yellow on a colour wheel Cool colours - those colours ranging from yellow-green through violet on a colour wheel Advancing colours - warm colours Receding colours - cool colours
3. construct a colour wheel given three primary colours;	Provide students with three colours in tempra paints. Have them design a colour wheel on a poster, and paint the three primary areas: Red, Yellow, Blue. By mixing any two primaries, have the students prepare colours and paint the secondary areas: R + Y = Orange; R + B = Violet; and Y + B = Green. By mixing the adjacent primary and secondary colours, have students prepare tertiary (intermediate) colours and paint the appropriate areas: Y + O = YO; Y + G = YG; G + B = BG; B + V = BV; V + R = RV; R + O = RO.	
4. identify primary, secondary, and tertiary (intermediate) colours;		Appendix B, "Colour Wheel"
5. identify and explain various colour schemes.	Prepare and use a colour chart to identify and explain the colour schemes. Discuss the use and purpose of colour schemes in planning and developing promotional components. Have the students experiment with and plan colour schemes for promotions, home decoration, store decor, etc.	<u>COLOUR SCHEMES</u> 1. Monochromatic - Any colour with its tints, shades, and/or tones 2. Analogous - Any series of colours found adjacent to each other on the colour wheel 3. Complementary - any 2 colours found opposite each other on the colour wheel 4. Split-complementary - any colour plus the 2 colours adjacent to its complement

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
		5. Double-split complementary - a four colour scheme using the 2 adjacent colours to each complement 6. Triadic - a three colour scheme that uses any three colours found to form an equilateral triangle on the colour wheel
B. Lettering The student should be able to:		
1. identify styles of lettering;	Use illustrations to identify and discuss groups of lettering (eg. Roman; Gothic; Italic; Script; Old English).	
2. explain the use of the styles of lettering in promotions;	Have the students prepare charts of the different styles of lettering in both upper case and lower case. Discuss the use and purpose of lettering in planning promotional activities. Have students match appeals to lettering styles.	
3. construct posters using styles of lettering appropriate to the theme.	Obtain materials from stores which handle art and drafting supplies. Bring examples from newspapers, magazines and other print media. Have the students use various types of materials to practice lettering skills: dry transfer lettering; felt markers; stencils; speed-ball sets; sign press; brushes	Refer to textbooks used in such courses as commercial art and graphic art. Refer to: Stoner, Chas., and Henry Frankenfield, Speedball Textbook, 20th ed. (Philadelphia, Pa.: Hunt Manufacturing Co., 1972).

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
C. Design The student should be able to: 1. identify and define the principles of design;	Use illustrations to explain the principles of design. Have students draw examples of each principle. Discuss the purpose of design principles in planning and developing promotions. Select advertising layouts from magazines that illustrate and emphasize these four principles. Have students prepare rough sketches of displays that use design principles effectively.	PRINCIPLES OF DESIGN 1. Composition 2. Dominance 3. Proportion 4. Balance - formal - informal - imbalance
2. recognize and explain devices used in design;	Use illustrations to explain design devices. Have students sketch examples of each device. Explain and illustrate the use of design devices in planning and developing promotions. Select magazine advertisements that emphasize each device. Have students mount these or posters. Have students prepare sketches of ad layouts on displays using devices to good effect.	DEVICES USED IN GOOD DESIGN 1. Harmony 2. Contrast 3. Graduation 4. Interference 5. Repetition and Rhythm
3. understand and explain arrangements used in design;	Use illustrations to explain design arrangements. Have students sketch each arrangement. Discuss the use of design arrangements in planning and developing promotions. Have students sketch examples of each arrangement. Analyze advertisements from magazines for the effective use of arrangements. Use opaque projectors for viewing illustrated pages by the whole class. Slide presentations may be made by photographing displays, billboards, and/or close-ups of magazine ads.	ARRANGEMENTS 1. Fan or radiation 2. Stair-step 3. Zig-Zag 4. Pyramid 5. Repetition and Rhythm

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
4. combine for good effect colour, lettering, and design techniques and principles.	Have the students prepare a promotional poster illustrating the application of colour, lettering, and design principles. Select a school activity, extra-curricular event, or a store laboratory sale to promote using these three concepts. Have students prepare a handbill or pamphlet about a school event using colour, lettering, and design effectively. Have students develop example product packages which illustrate packaging strategies.	PACKAGING CONSIDERATIONS 1. Security 2. Appeal 3. Protection of item 4. Convenience 5. Ease of handling 6. Storage and display 7. Promotion 8. (Other)
IV. ADVERTISING		
A. History The student should be able to: 1. define <u>advertising</u>;	Ask students to define <u>advertising</u>. Compare definitions to those for <u>publicity</u>, <u>personal selling</u>, and <u>display</u>.	
2. demonstrate a knowledge of the history of advertising; 3. trace the evolution of advertising in marketing;	Use the library to research advertising in earlier times. Have students prepare a report on the history of advertising in North America, Canada, and/or Manitoba. Gather examples of back issues of newspapers and magazines. Prepare a bulletin board of the history of advertising. Have students research the advertising campaigns for some selected product(s) (e.g., Kraft, Kellogg's, Ford, Imperial Oil, Coca-Cola, credit unions, banks, patent medicines, etc.) Emphasize the influence of changes in government, technology, ethics, standards, and economics upon the evolution of advertising in marketing.	ADVERTISING Advertising is any <u>paid</u> form of <u>non-personal</u> presentation of <u>ideas, goods and services</u> by an <u>identified</u> sponsor.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
B. Purpose The student should be able to: 1. understand the need for and the importance of advertising;	The merchandise assortments in stores are made possible through the promotional effects of advertising. Have students discuss and/or write a report on how advertising causes greater merchandise assortments. Discuss how advertising plays a role in our standard of living. Debate the fact that advertising helps keep prices up/down.	
2. relate advertising to mass production and mass consumption.	Discuss the influence of the Industrial Revolution on mass production and mass consumption of products. Relate this influence to advertising. Have students prepare a term paper on this topic. Select a product (handheld calculators, sports equipment, food products from McDonald's, etc.) and discuss the mass production, the mass consumption, and the advertising of the product.	Getting Down to Basics About Advertising (teacher resource manual, teacher idea piece, two full-colour sound filmstrips, and student materials) may be purchased from Canadian Advertising Advisory Board, 1240 Bay Street - Suite 302, Toronto, Ontario M5R 2A7
C. Elements of Advertising The student should be able to: 1. identify the elements of an advertisement;	Explain and discuss the elements of an advertisement as being effectively combined to form an appealing advertisement. Have students identify the elements of an advertisement from a given example (magazine advertisement).	Bibliography of Resources for Advertising - available from Consultant Services, Department of Education, 411-1181 Portage Avenue, Winnipeg, Man., R3G 0T3
2. apply appropriate elements to the preparation and layout of advertisements;	Have students create headlines, illustrations, logos, trademarks, brand names, and slogans and use colour during the explanation and discussion of the elements of an advertisement.	ELEMENTS OF AN ADVERTISEMENT 1. Headlines and sub-headlines

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	At the end of the unit on advertising each student should be able to submit an original advertisement for display on the bulletin board. Allow those students who are not artistically inclined to use pictures from other sources to complete their layout.	2. Copy 3. Illustrations 4. Brand Names 5. Slogans 6. Logos 7. Trade-marks 8. White space or background 9. Margins or borders 10. Colour 11. Movement, real or implied 12. Appeal
3. write copy for advertising.	Discuss journalism skills applicable to advertisements in the preparation of clear and concise messages. Have the students write copy for advertising layout.	
D. Appeals The student should be able to:		
1. develop a list of advertising appeals;	Using the AIDA concept (attention, interest, desire, action), have students review advertisements and determine what features of the advertisement caught their attention or aroused their interest. Have students recognize the need that the advertisement served to identify, and speculate on the appeal that the advertisement contained.	
2. demonstrate the ability to recognize and apply advertising appeals;		
3. identify and explain devices to attain advertising appeals;	Have students prepare lists of traits that describe fellow students. Match these traits with feature or appeals obvious to specific products (e.g.: records, potato chips, blue jeans) Have students prepare advertisements for specific target markets.	ADVERTISING APPEALS 1. Biological needs 2. Security 3. Inclusion 4. Esteem 5. Self-fulfillment 6. Material possession 7. Love and affection 8. Health 9. Fear 10. Convenience 11. Emulation
4. demonstrate the ability to use devices to attain advertising appeals.	Have students select items of their choice and role-play selling situations to show how the product appeals to a customer.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
		12. Excitement and change 13. Predictability 14. Enjoyment and pleasure 15. Other
E. Print Media The student should be able to:		
1. understand the importance of print media in advertising;	Discuss the purpose and importance of print media. Contact local newspapers for their list of prices and/or rate-cards.	PRINT MEDIA 1. Newspapers 2. Magazines - consumer - class - technical - trade - professional 3. Directories - Manitoba Telephone Directory - Henderson's Directory 4. Programs - sports events - stage productions - school events 5. Brochures 6. Fliers and Handbills 7. Newsletters
2. identify the various types of print media;	Prepare a bulletin board or a collection of samples of the various local types of print media (newspapers, posters, magazines, flyers, directories, catalogues). Use a bulletin board or counter display for the samples.	
3. identify the features of each type of print medium.		
4. list and explain the advantages of the various types of print media;	Analyze the print media for percentage of space devoted to advertisements and to journalism, for identification of target group appeal, and for the type of product being promoted.	
5. compare the rates of each type of print medium;	Have the students discuss and prepare a list of advantages for each type of print medium.	
6. identify the advertisers that use each type of print medium;	Research costs and criteria for costs for print media. Explain the importance of this information for budget purposes. Prepare a table to show comparisons and rates of the various types of print media.	
7. identify the readers for whom each type of print medium is intended;		
8. design a flyer using print media.	Have students match print media with the nature and the needs of particular businesses/ organizations. Discuss and emphasize the appropriateness of print media to the people who view it.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Have students prepare a flyer for the school, store laboratory, or any project that would promote some aspect of school activity.	
F. Outdoor Media The student should be able to:		
1. understand the importance of outdoor media in advertising;	Discuss, with illustrations and examples, the use and the importance of outdoor media. Develop a slide collection of outdoor media. Request rates and demographic data available from local transit companies, billboard owners, and sign companies.	
2. identify the various types of outdoor media;	Have the students locate and list the various types of outdoor media used in the community (billboards, transit cards, store fronts, posters, trucks and other vehicles, novelty media). Prepare a map of the local area and indicate the traffic flow, types of media, and message.	OUTDOOR MEDIA 1. Posters and Poster Panels 2. Billboards 3. Electric Spectaculars - billboards - signs on top of buildings 4. Store-Front Signs 5. Window displays 6. Car Cards and Transit Cards 7. Signs on trucks and other vehicles 8. Skywriting and Banners
3. identify the features of each type of outdoor medium;	List and discuss the features of each type of outdoor medium. Use slides to illustrate each. Use materials obtained from media companies referred to above.	
4. list and explain the advantages and disadvantages of each type of outdoor medium;	Have students work in groups to discuss and to prepare a list of advantages and disadvantages of the various types of outdoor media to present to the class. Prepare a chart, flip-chart, poster or bulletin board to illustrate these.	
5. compare the rates of the various outdoor media;	Research costs and the criteria for costs for each type of outdoor medium. Prepare a table of comparative costs and the users of each medium. Explain the importance of this information for budget purposes.	
6. identify the advertisers that use outdoor media;	Have the students locate various examples of outdoor media and prepare a list of advertisers that use these media.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
7. design a poster for use as an outdoor advertisement.	Have students prepare a poster for an outdoor advertisement of a product or promotion in the school, store laboratory, and/or any forthcoming school activity.	
G. Electronic Media The student should be able to:		
1. understand the importance of electronic media in advertising;	Use class discussion to determine the importance of advertising by electronic media. Have students ask the sales departments of local T.V. and radio stations for information on the advantages, descriptions, and prices.	
2. identify the various types of electronic media;		ELECTRONIC MEDIA 1. Radio 2. Television 3. Closed-circuit media
3. identify the features of the various electronic media;	From a list of the various types of electronic media used for advertising, encourage students to prepare a comparative table of media showing advantages, costs, audiences, and the numbers of viewers at given times of the day.	
4. list and explain the advantages and disadvantages of each type of electronic medium;	Prepare a schedule for students to use and have them view and listen to electronic media to record the time, nature of program, and the product/service promoted.	
5. compare rates, times, and audiences for each type of electronic media;		
6. identify the advertisers that use each type of electronic media;		
7. identify the viewers/ listeners that use each type of electronic media;		

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
8. prepare an audiovisual script.	Prepare a script form for students and have them use the form to prepare scripts of radio and/or television advertisements. Record the ads on audio- or videotape. The ads might promote a product or service associated with a school project, store laboratory, or some future event of interest to students.	"Script Form", Appendix B
H. Other Media The student should be able to:		
1. understand the importance and application of other media in advertising;	Use class discussion to identify other media used in advertising: - word of mouth, - samples, - coupons, - novelties, - announcements, - rebates, - banners. Discuss the illustrations and examples, the use, importance, and application of other media in advertising. Have students cite examples of other media in the community.	
2. analyze the use of other media in advertising.	Have the students work in groups to prepare a list of other media, the products/services advertised, and the type of customer who comes in contact with the media.	
I. Ethics and Standards The student should be able to:		
1. appreciate the reason for ethics in advertising;	Discuss the relationship and the importance of ethics in advertising to the community. Have students discuss how the following may occur in advertising campaigns: - exploitation of values, - appeals to children, - tokenism, - discrimination, - immorality, - implications and half-truths.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. recognize the importance of standards in advertising;	Discuss the need for standards in advertising and have students describe WHY we OWE the community ethical conduct. Have the students research the topic "Standards in Advertising" and prepare a paper/presentation on the topic. Some points to emphasize might include: definition of standards; analysis of the target group/community; the nature of the product/service; the rules of associations; and the laws of government.	Code of Standards, Canadian Code of Advertising Standards, Broadcast Code for Advertising to Children, available from Canadian Advertising Advisory Board, 1240 Bay Street, Suite 302, Toronto, Ontario M5R 2A7
3. develop an awareness of the influence of bilingualism and multiculturalism on advertising; 4. identify the use of bilingualism in advertising; 5. recognize the components of Canadian multiculturalism.	Have students contact the Department of Consumer and Corporate Affairs and the Better Business Bureau for information on advertising standards. Prepare a counter display or bulletin board display of the materials. Use class discussion to develop the awareness of the influence of bilingualism and multiculturalism on advertising. Gather samples of advertisements that appeal to cultural groups and special language groups. Have students identify the cultural appeal and the product/service being advertised. Write to publishers for French. Use class discussion and research to identify the cultural components in the classroom, school, community and nation.	English and French copies of the periodicals Maclean's, Chatelaine, En Route (Air Canada) may be obtained from their publishers.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
V. SPECIAL ACTIVITIES FOR PROMOTIONS		
A. Purpose		
The student should be able to:		
1. state and explain the purpose of special activities for promotions:	Emphasize the use of one theme to relate special activities to a particular promotion.	
(a) create an activity to portray a desired image,	Use the school store laboratory, research in the community, and/or a study of advertisements to review the use of special activities in promotions. Have the students find examples of special activities that reinforce a desired image; enhance goodwill; increase sales; and improve morale among staff.	SPECIAL ACTIVITIES 1. Publicity 2. Sponsorships - clubs - parade floats, etc. 3. Demonstrations 4. Contests 5. Fashion Shows 6. Prizes
(b) identify ways to enhance goodwill,		
(c) identify special activities to increase sales,	Have students list special activities to be used in the school, school store laboratory or a simulated business.	
(d) identify ways of using special activities to improve morale.	Have students report on the creation and promotion of special promotional phenomena such as major appliances, toys, jewellery, entertainment, gadgets, etc.	
B. Types of Activities		
The student should be able to:		
1. identify and explain the use of various types of activities;	Give examples of specific promotional activities which are obvious in the local community. List those aspects of the promotion which are <u>not</u> advertising displays, or personal selling, and identify those as "special activities."	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. select and prepare appropriate activities for a given theme.	Have the students choose and prepare special activities related to a theme. Relate the activity to school events (dance, yearbook, speakers, graduation, fashion show, sports and career days, etc.). Prepare a proposal for these activities in sufficient detail to allow others to develop the promotion.	
C. Evaluation The student should be able to:		
1. analyze the effect of special activities on sales, image, goodwill and morale.	Discuss and construct an instrument to measure the effect of special activities on results of sales, attendance or any other desired criteria. To determine the effect of special activities on image, goodwill, and morale, have students use such measuring devices as questionnaires, sales charts, coupons, profit statements, record of markdowns, and/or other devices.	
VI. DISPLAY A. Purposes The student should be able to:		DISPLAY A display is the effective use of design in the promotion of merchandise, image and goodwill. Display is visual merchandising.
1. define <u>display</u>;	Have students offer their ideas of "display", and help to develop a definition that uses their ideas. Provide guidance to ensure that the definition serves all types of displays, all purposes for displays, and all uses of displays.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. identify and explain the purposes of display;	Discuss the concept of display as a part of promotion. Have students report on the purposes of display. Use slides to analyze displays. Identify several purposes of displays from each slide. Use field trips to shopping centres, or guest speakers to relate the purpose of displays.	PURPOSE OF DISPLAY 1. To attract attention 2. To arouse interest 3. To stimulate desire 4. To sell merchandise 5. To create goodwill 6. To enhance image 7. To enhance the environment 8. To direct the flow of traffic 9. To support ideas 10. To store merchandise
3. identify and explain the "AIDA" concept;	Emphasize and discuss the components of the "AIDA" concept. Point out how display can accomplish the "AIDA" concept.	
4. plan a display on paper.	Have the students prepare displays through drawing detailed display plans. Plan a display on paper to attract the attention of the target group. Have students explain why their plan should appeal to target groups whom they identified. Design display features that create interest related to the needs of customers. Have students identify the needs of their chosen target market and support their display plan in terms of this perceived interest. Draw displays that create a desire by changing customer wants to needs. Ask students to explain <u>how</u> their display plan creates a desire. Design a display which causes purchasing action. Encourage students to use coupons, tokens, prizes, or some other action-oriented device to induce sales.	AIDA CONCEPT A ttract Attention I nterest Aroused D esire stimulated A ction to buy

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
B. Types The student should be able to: 1. understand the need for and the importance of window and interior displays: (a) identify and explain the types of window displays;	Explain the role of window displays and interior displays in merchandising. Have students list the purposes of displays and categorize those purposes by windows/interior classifications. Identify the types of window displays and discuss their special purposes. Have students sketch window display areas and prepare alternative sketches to examine the various backgrounds common to stores. Divide class into groups according to different types of stores (drug, variety, department, specialty, etc.). Have members in each group observe in pairs in order to check information. Prepare an observation sheet to be signed by both students. Have the students prepare a report on the nature of the store window observed, the purpose of the display, and the type of customer served.	Display Kit, available from the Department of Education Library, Main Floor, 1181 Portage Avenue, Winnipeg, Manitoba R3G 0T3 WINDOW DISPLAY TYPES 1. Preseason - feature item 2. Runner - current stock 3. End of Season - clearance 4. Special Events - Mother's Day, Valentine, Easter etc. WINDOW BACKGROUNDS 1. Full background 2. Partial background 3. Open background USES OF AIDA IN DISPLAY A))---- window displays I) D))---- interior displays A)

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
(b) identify and explain the types of interior displays.	From student recall, list the types of interior displays. Have students prepare a chart to illustrate the uses of the various interior displays. Have students sketch interior displays as they would be used in stores, the store laboratory, and/or school showcases. From trip observations, have students create a portfolio for classroom use, showing the various interior displays encountered. Obtain permission for students to photograph interior displays.	
C. Lighting		
The student should be able to:		
1. understand the need for and the importance of lighting:	Discuss the use of lighting in focussing on displays and in providing eye-catching effects. Demonstrate how lighting selects and enhances parts of a display area.	
	Emphasize the need for safety and economy.	
(a) describe the effect of lighting intensity on displays;	Have the students experiment with various levels of lighting intensity. Use spotlights in classroom/store laboratory settings.	
(b) identify and explain how coloured lighting affects displays;	Review the psychology of colour. Have students refer to colour wheels and colour terminology.	
	Give the students an opportunity to use coloured lights on different colours of merchandise.	
	Provide students with a copy of the table showing the effect of coloured lights on various colours.	"Effect of Coloured Lights", Appendix B
(c) demonstrate the effect of direct and indirect lighting;	Discuss and demonstrate the use of direct and indirect lighting in building displays. Build circumstances to illustrate the use of spot lighting, background lighting, and diffusion.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
(d) illustrate the tinting and shadowing techniques of lighting.	Discuss the tinting and shadowing techniques of lighting using both white and coloured bulbs/ lens.	
D. Props The student should be able to:		
1. understand the need for the preparation, use, and maintenance of props;	Have students manufacture simple props. Assist in the preparation of a list of suppliers and prepare an inventory of the props available for use in the school/store laboratory. Emphasize the need for cleanliness and for proper storage. Approach local stores for used props that would normally be discarded.	
2. identify the different types of props.	Discuss and explain the different types of props: Structural, Decorative, and Symbolic. Create a list of each so that the students might select a project to build props. Have students bring to class materials that would emphasize textures, seasons, themes, motion, temperatures, emotions, or any other expression useful to an appeal.	TYPES AND CHARACTERISTICS OF PROPS 1. Structural - build up window level - support the merchandise 2. Decorative - purely ornamental - may be attention-getter 3. Symbolic - embodies some characteristics of the merchandise - tells a story
E. Planning and Construction The student should be able to:	Have students prepare a yearly timeline for promotions. Select a sales event from the timeline, and list the areas of the store laboratory/or types of displays to be used.	
1. understand the need for and the importance of planning a display;	Discuss the importance of advance lighting in terms of sales planning, materials acquisition, and construction.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. plan a display;	Discuss the relationship of timeliness and seasonal activities to planning a display. Have students list the merchandise (idea or service) to be used in congruence with the identified theme. List the props to be used. Sketch, using good design principles, the intended layout for a display. Prepare show cards to be used.	PLANNING A DISPLAY 1. Select a theme. 2. Determine the display location. 3. Select the items of merchandise (or ideas, services) to be used. 4. Sketch the display layout complete with props, lighting, merchandise colours used, etc.
3. construct a display.	Emphasize the importance of efficiency and the effective use of materials in building a display. Have students construct a display in the store laboratory or using a scale model. Review and apply the design devices and arrangements.	BUILDING A DISPLAY 1. Clean the display area (floors, walls, glass, fixtures). 2. Gather all materials specified on the display planning sketch. 3. Clean all merchandise, props, and supplementary fixtures. 4. Prepare show cards. 5. Build display to specifications. 6. Check and adjust for effect.
F. Analysis and Evaluation The student should be able to: 1. analyze and evaluate the effectiveness of a display.	Conduct tours of different types of retail outlets and have students conduct their personal evaluation of the displays. Have students identify the type of window/interior display, the type of background, the use of lighting, and the type of props used. Use a display evaluation form. Have students evaluate their own scale-models or store-laboratory displays.	"Display Evaluation Form", Appendix B

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
VII. PERSONAL SELLING		
A. Purpose		
The student should be able to:		
1. understand the need for and the importance of personal selling in marketing.	Discuss and explain personal selling as a basic marketing function. Explain the relationship of personal selling to promotions. Review the four components of promotion. Emphasize that personal selling is needed when a product is to be demonstrated and to sell merchandise of high price value. Have students discuss how selling techniques are useful not only in merchandising, but also in advancing personal ideas, goals, and other characteristics.	
B. Special Preparations		
The student should be able to:		
1. develop an awareness of special preparations involved in personal selling: (a) understand the need for salesmanship;	Have the students compare personal qualifications to those needed in selling, by preparing a personal inventory of attributes and skills. Develop a checklist of good sales qualifications and have students rate themselves. Have the students identify sales skills they lack or in which they need improvement. Assign groups of students to investigate and report on educational requirements. Search newspaper advertisements to determine job requirements.	FACTORS AFFECTING SALES SKILLS 1. Emotional 2. Physical 3. Cultural 4. Previous Experiences 5. Ability to Communicate 6. Attitudes

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
(b) demonstrate good selling techniques;	Present a series of slides, transparencies, and/or videotapes about good selling techniques. Hold a class discussion. Have students develop a checklist to be used in observations of how salespersons did or did not use the steps of a sale. Prepare scripts and role-play selling situations. Invite a guest speaker to address the class on selling techniques. Emphasize the importance of ethics and the use of techniques accepted by the community.	MOTIVATION Motivation is a drive force to satisfy a need. SALES MOTIVATION TECHNIQUES 1. Remuneration 2. Hours 3. Working Conditions 4. Benefits 5. Opportunities for Advancement 6. Autonomy
(c) identify methods by which sales people are motivated;	Define motivation. Have students list their needs from a job and rank them. Discuss how their rank-order of needs is a rank-order of motives. Explain and discuss how management uses motives to increase sales.	
(d) describe and evaluate remuneration incentives;	List various remuneration methods. Have students discuss the advantages of each.	OTHER FORMS OF SELLING
(e) relate personal selling to the promotional theme;	Discuss how personal selling for a promotion must consider the theme used in the promotion. List ways that sales people support the promotion.	1. Door-to-door selling 2. Telephone selling 3. Vending machines and service 4. Follow-up activities
(f) identify other forms of personal selling;	Prepare a chart to show how personal selling affects a promotion of various items of merchandise (e.g., autos, ballpoint pens, meats, travel services, toys, etc.).	REMUNERATION METHODS 1. Wages 2. Salaries 3. Commissions 4. Salaries plus commissions 5. Bonuses 6. Subsidized auto, housing, etc. 7. Expense accounts 8. Discounts 9. Paid vacations
(g) measure the effect of personal selling on promotions.		

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
VIII. CUSTOMER SERVICES A. Purpose The student should be able to: 1. identify and explain the need for and the importance of the various types of customer services; 2. list various conveniences that a business may offer its customers;	Have the students compile and discuss a list of customer services appropriate for merchandising stores. Have students complete orders over the telephone. Have students research and report on the various delivery systems used in business. Given simulated delivery problems, have students determine the most appropriate method of delivery for each situation and state reason/reasons for using the method. Prepare a simulated layaway sale situation and have students go through the complete procedures (forms, records, etc.). Display sample forms obtained from local business. Have students research and describe gift wrapping procedures used by various businesses. Flow-chart a system for handling returns and adjustments in a community store, store laboratory or simulation project. Conduct a community survey to determine consumer credit services available locally. Prepare a chart to illustrate this service. List sources of credit information.	CUSTOMER SERVICES 1. Telephone ordering service 2. Delivery systems 3. Layaway sales 4. Gift wrapping 5. Handling adjustments 6. Handling returns 7. Credit policies 8. Repairs 9. Restrooms 10. Medical assistance 11. Directories 12. Information centers 13. Nurseries 14. Personal shoppers 15. Lost and found 16. Coat checking 17. Parking 18. Parcel pickups 19. Shopping bags 20. Security systems

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
3. evaluate the impact of customer services on promotions.	Have students interview credit managers from large and small stores. Determine what types of credit are most common. Display examples of credit forms. Simulate credit problems and ask students to identify what type of credit would meet each need. Prepare a bulletin board to illustrate the types of credit available in local stores, and the forms used. Construct a flowchart of the charge-payment cycle in credit sales. Discuss the integration of customer services with promotions and the relationship of customer services to the one-step shopping concept. Prepare a questionnaire to evaluate the effectiveness of customer services. Have respondents providing a rating of each service.	

CORRELATION OF COURSE CONTENT WITH SUPPORT MATERIAL

	APPROVED TEXTBOOKS			OTHER REFERENCES
COURSE CONTENT	Nolan and Warmke. Marketing Sales Promotion and Advertising	Samson et al. Display, Planning and Techniques	Samson, H.E. Advertising Planning and Techniques	
				Retailing Principles and Practices, Richert et al. Introductory Marketing: A Retail Perspective Taller (b)
I. COURSE INTRODUCTION				
A. Purpose of Promotions	Unit I	Suggested Resources	Suggested Resources	Marketing 2 Fraser Marketing: A Canadian Perspective Taller (a), Richert et al.
II. ONE THEME FOR PROMOTIONS				
A. Aims and Objectives	Chapter 12	Section 3, Projects 10 and 11	Section 3	Fraser
B. Types of Themes	Chapters 4,11,12, and 14	Section 3	Section 3	Taller (a)
C. Costs and Resources	Chapters 4,11,12, and 14	Section 3	Section 3	Richert et al.
D. Market Analysis	Chapters 4,11,12, and 14	Section 3	Section 3	Marketing in Action Warmke et al.
E. Components of a Promotion	Chapters 4,11,12, and 14	Section 3	Section 3	
F. Components of the Theme	Chapters 4,11,12, and 14	Section 3	Section 3	Basic Marketing: A Managerial Approach McCarthy

COURSE CONTENT	APPROVED TEXTBOOKS			OTHER REFERENCES
	Nolan and Warmke.	Samson et al.	Samson	
III. COLOUR, LETTERING AND DESIGN				
A. Colour	Chapter 14	Section 2	Section 6	Taller (a)
B. Lettering	Unit 4, Appendix A	Section 5, Project 23		Richert, et al.
C. Design	Unit 4	Section 2, Project 7	Section 5, Project 24	Fraser
IV. ADVERTISING				
A. History	Chapters 9 and 10	Suggested Resources		Warmke et al.
B. Purpose	Chapter 12		Section 1	Fraser
C. Elements of Advertising	Chapters 13 and 14		Section 4	Taller (a)
D. Appeals	Chapters 5,6,7, and 13			Richert et al.
E. Print Media	Chapter 17		Section 5	
F. Outdoor Media	Chapter 18		Section 6	
G. Electronic Media	Chapter 19		Section 7	
H. Other Media	Chapter 18		Section 6	
I. Ethic and Standards	Chapters 10 and 18		Section 6	
V. SPECIAL ACTIVITIES FOR PROMOTIONS				
A. Purpose	Unit VI	Suggested Resources	Suggested Resources	Taller (a)
B. Types of Activities	Unit VI			Fraser
C. Evaluation	Chapters 7 and 21			Richert et al. Warmke et al.

		APPROVED TEXTBOOKS		OTHER REFERENCES	
	COURSE CONTENT	Nolan and Warmke.	Samson et al.	Samson	
VI.	DISPLAY				
	A. Purposes	Chapter 6	Sections 1,2, and 3	Suggested Resources	Warmke et al.
	B. Types	Chapter 6	Sections 3, 4, 5, and 6		Fraser
	C. Lighting	Chapters 16,18, and 23	Section 5		Richert et al.
	D. Props	Chapters 16,18, and 23	Section 7		
	E. Planning and Construction	Chapters 16,18, and 23	Sections 3 and 7		
	F. Analysis and Evaluation	Chapter 16	Section 6		
VII.	PERSONAL SELLING				
	A. Purpose	Chapters 6,23, and 28	Suggested Resources	Suggested Resources	Taller (a)
	B. Special Presentation	Chapters 6,23, and 28			Warmke et al. Richert et al.
VIII.	CUSTOMER SERVICES				
	A. Purpose	Chapter 22	Suggested Resources	Suggested Resources	Richert et al.

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GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
I. PERSONALITY A. Personal Attributes The student should be able to: 1. define <u>personality</u>;	Invite students to provide their definitions of personality. After noting several student definitions of personality, provide a definition and show how it relates to student ideas.	<u>PERSONALITY DEFINED</u> Personality is the sum total of traits and characteristics (physical, mental, and emotional) that make up an individual.
2. understand the need for and the importance of personality development;	Using the definition of personality have students form groups and prepare lists of several advantages or needs for developing personality in positive directions. Have student groups present their lists to the class and compare them.	Kit: "Human Relations and Management", available in the Library, Department of Education, 1181 Portage Avenue, Winnipeg, Manitoba R3G 0T3
3. identify and discuss factors that affect personality;	Personality is viewed as the total of traits and characteristics that make up an individual. The hereditary factors carried from parentage create predispositions for traits, and the environment is usually viewed as having a bearing upon habits, customs, and other characteristics. Have students list the demographic factors that affect personality.	<u>DEMOGRAPHY DEFINED</u> Demography refers to the placement and distribution of ways in which people may be classified. <u>SAMPLE DEMOGRAPHIC FACTORS</u> - Age - Sex - Income - Education - Religion - Language - Race - Ethnicity - Job types - Specific occupations - Physical size - Culture

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Have students list the psychographic factors that affect personality. Have students describe the reasons for honesty, and demonstrate honesty when working with people. Discuss and demonstrate courtesy when working with people. Have students exhibit industriousness as related to individual growth. Help students to develop an awareness of the different values held by others. Discuss the impact of heredity and environment upon one's personality.	PSYCHOGRAPHICS Psychographics refers to the strength of individual traits that a person exhibits. SAMPLE PSYCHOGRAPHIC FACTORS - Temperament - Self-esteem - Values - Honesty - Intelligence - Tact - Industriousness - Courtesy
4. identify and discuss characteristics of personality;	Have students prepare lists of characteristics that they would assign to themselves/others. From this list, have students identify which might be a result of heredity, and which might be a result of environment. Discuss how one's perception of "characteristics" is based on one's values.	
5. describe how personality is affected by situations.	Have students recall how they reacted to given situations by providing case studies to vary the situation. For example, suggest that a student is asked to loan money to mother, brother, teacher, stranger, and discuss how they tend to react to different situations. Discuss the way in which one's personality causes the student to react differently in different situations. Question the validity of different reactions.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
B. Human Relations The student should be able to: 1. define human relations; 2. discuss the importance of and need for human relations; 3. identify ways to improve the development of human relations.	Encourage students to provide their own definitions of human relations. Have these reported to the class and compared for similarities. Have students discuss the importance and need for an understanding of human relations. Provide case studies to emphasize the advantages of good human relations. Have students list and discuss what individuals might do to improve their human relations skills. Discuss with students how one acquires the ability to get along, and why one would NOT have this ability. Discuss how we are all interdependent parts of a system. Use a case of controversial content to debate. The debate should emphasize how students relate when differences of opinion occur.	HUMAN RELATIONS Human relations is the ability to get along with others. IMPROVING HUMAN RELATIONS 1. Self-assessment 2. Listening to others 3. Working in groups 4. Accepting criticism 5. Avoiding impossible situations 6. Group therapy 7. Workshops 8. Practice
C. Industry Expectations The student should be able to: 1. identify and describe business expectations of employees;	Encourage students to assume the role of the employer and to describe the qualities that they would ask of their staff. Have students prepare a list of skills and personal traits that they would expect an employee to bring to a specific job. Provide students with a job description(s) to be used for the list of skills and traits.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. identify and analyze ethics for employment;	Have students define ethics. Use the definition for ethics in relation to employment situations. Discuss how a business is usually a series of systems whereby the members of the business interrelate in their daily activities. Emphasize the advantages of trust and integrity in a business, and the way in which ethics promote trust and integrity.	ETHICS DEFINED Ethics is the study of conduct between individuals.
3. identify the outcomes of loyalty toward the employer;	Have students discuss what is meant by loyalty. Discuss loyalty as a desirable quality for an employee to possess. Have students list the advantages of being loyal to the employer/ business, and specify the advantages in regard to both the employer and the employee.	LOYALTY DEFINED Loyalty is the process of honouring the policies, procedures, and goals of the employer.
4. identify and assess aptitudes and abilities to determine self-worth and job satisfaction;	Students should be encouraged to assess their skills and aptitudes as suited to the job of their choice. Have students select a job from a newspaper and determine how well they would be suited to that job in terms of skills, aptitudes and need satisfiers. Refer to the Skills-Needs Model to discuss the concepts of satisfaction and satisfactoriness as they apply to aptitudes and abilities respectively.	LOYALTY CHARACTERISTICS - Honesty - Enthusiasm - Intelligence - Courtesy - Attitudes - Tact - Initiative - Interest in others - Industry - Dependability - Confidence "Skill Needs Model," Appendix B
5. develop an awareness of the influence of change on personality and job satisfaction.	Discuss changing business environments, technology, jobs, expectations, resources, and other environmental factors. Have students explain how they would adjust to such influences. Identify how changes would affect job satisfaction and personality. Have students list likely changes that they will experience over the next few years, and the influences that this will have on them.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
II. COMMUNICATIONS		
A. Purpose The student should be able to: 1. understand the need for and the importance of communications.	Have students identify ways to communicate, such as speech, writing, drawing, codes, implications, gestures, etc. Create role-play situations from case studies so that predictable outcomes are estimated. Have students list reasons that communications are important and necessary. Using charades, have students communicate without language.	"Communications Cycle," Appendix E
B. Definition The student should be able to: 1. define <u>communications</u>.	Have students communicate in three or four ways and then discuss and define what they have done.	<u>COMMUNICATIONS DEFINED</u> Communications refers to them exchange of information between two or more people.
C. Types of Communication The student should be able to: 1. identify and explain horizontal and vertical communication;	Define and discuss horizontal and vertical communication. Provide the students with samples of organizational charts and have them discuss the ease of communications flow between positions on the chart.	<u>VERTICAL COMMUNICATION</u> The flow of information between superior(s) and subordinates(s) within an organization <u>HORIZONTAL COMMUNICATION</u> The flow of information between persons of equal status within an organization
2. identify and explain formal and informal communication;	Refer to the store-laboratory or some business in the local community, and have students identify and explain formal communications. Have students refer to organizational charts and discuss the <u>nature</u> of formal communication that is likely to occur.	<u>FORMAL COMMUNICATIONS</u> The personal exchange of information between two or more people using a medium accepted in policy

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Identify the nature of informal communications that are likely to occur in an organization. Discuss the purpose and importance of informal communication. Analyze the communication in a classroom, and identify that which is formal, informal, vertical, horizontal, and combinations of these.	INFORMAL COMMUNICATION The personal exchange of information between two or more people using a medium recognized as comfortable to both/all parties
3. identify and explain business-client communication.	Using a store or store-laboratory as an example, discuss the business-client relationship as a communication situation (exchange of information between two or more people). Have students list personal qualities that a representative of business would possess if good communication were expected. Discuss the importance and value of first impressions, last-person contacts, image, need for honesty and integrity, etc.	
D. Business Forms and Media The student should be able to:		BUSINESS MEDIA - Memos - Letters - Reports - Speech - Demonstrations - Video records - Telephone - Dictaphone - Resumé - Meetings - Conferences - Conversation - Trade shows - Gestures - Literature - Catalogues - Promotions - Action - Other
1. demonstrate the ability and need to use internal business forms.	Have students list the various communications media commonly found in business settings. Have students identify business forms, their uses and purposes, and then complete the forms (memorandum, telephone memos, letters, dictatape, etc.). Role-play, using various media, and evaluate the students' deportment, telephone usage, ability to refer, and general judgment.	
2. identify and analyze promotions as a method of communication to the public.	Have students discuss the four elements of a promotion. Identify how the communication process applies to each of the four elements of a promotion. Discuss the various ways that "feedback" is measured in a promotion, (e.g., profits, increased sales, positive image, goodwill, more clientele, etc.).	ELEMENTS OF A PROMOTION 1. Advertising) 2. Display) governed by 3. Personal selling) one theme or 4. Special activity) idea

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
E. The Communication Process The student should be able to:		
1. explain the relationship of senders, messages, media, and receivers in the communication cycle;	Discuss the communication cycle and prepare a model. Have students prepare a poster/bulletin board display of the communication model. Discuss the importance of each element in the model. Have students apply various situations to the model to interpret how communication can be enhanced or thwarted: parent to offspring; teacher to student; student to student; student to teacher and/or parent; salesperson to customer and/or employer, etc.	"Communication Model," Appendix B
2. recognize the need for and importance of feedback;	Discuss the importance of feedback and have students explain ways to gather feedback in various communication situations. Have students prepare ways to measure such feedback as sales, goodwill, image, and anticipated responses. Discuss feedback as a goal for policy making and budgeting . . . a return on investment.	
3. understand the importance of timeliness in communication;	Review the purposes for communication and discuss the concept of timeliness. Have students role-play situations where timely warnings are necessary to avoid accidents (e.g., use a blindfold and place the student in an obstacle course). Have students prepare a schedule of anticipatory advertisements/promotions to be used for a given quarter or half-yearly period. Discuss the importance of timeliness with regard to sales events, advertisements, and have students estimate the results of good/poor timing.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
4. understand the importance of data processing to communication;	Discuss with students the concepts of computer processing. Diagram a computer processing system and compare it to a communication model. Have students list advantages of computerized data processing (speed, accuracy, routines, difficult mathematics and statistics, etc.). Develop a list of disadvantages (impersonal, inability to adjust for non-programmed alternatives).	"Computer Processing System," Appendix B
5. identify and explain the use of various computer applications to communications.	Have students prepare a list of computer applications to communications. Discuss how any repetitive task in communication is best computerized for efficiency.	SOME USES OF THE COMPUTER -Credit -Payrolls -Billing -Cash registers -Lists of people -Taxation -Library searches -Statistics -Air transport reservations
III. EMPLOYER/EMPLOYEE RELATIONSHIPS		
A. Employer Contributions		
The student should be able to:		
1. identify the opportunities and incentives provided by the employer;	Obtain a handbook for employees from a company or union. Discuss the expectations that employees might have of the employer's responsibilities to the employer-employee relationship. Have students list the contributions that employers provide to the relationship.	EMPLOYER'S CONTRIBUTIONS -Fair pay -Evaluation -Job description -Social and working environment -Training -Supplies and materials -Feedback -Safety -Opportunities -Etc. -Integrity -Motivation

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. understand the purposes of a job description;	Examine the job description and have students assess the advantages and merits of the description. Have students prepare a list of purposes of a job description. Discuss the value of job descriptions. Have students identify any disadvantages of job descriptions.	PURPOSES OF A JOB DESCRIPTION 1. Outline duties 2. Describe routines 3. Assign responsibility 4. Delegate authority 5. Delimit accountability 6. Prevent conflicts 7. Describe ability requirements 8. Categorize personnel 9. List expected skills and attitudes 10. State desired education
3. describe the components of a job description;	Have students prepare a job description of their choice: part-time employment; school store laboratory; student's role in a school; etc. Identify the components of a job description and compare them to the purposes of it.	
4. identify various systems of receiving pay;	Have students prepare a chart/bulletin board to depict various pay systems. Evaluate each, giving its advantages/disadvantages. Have students identify how they are paid in their part-time employment. Have them discuss how they might rather be paid, and why.	PAY SYSTEMS 1. Wages 2. Salaries 3. Commissions 4. Piece work 5. Combinations of the above 6. Bonus 7. Benefits (housing, discounts, etc.) 8. Vacations 9. Auto usage 10. Subsidies (rents, housing, etc.) 11. Expenses

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
5. identify and explain the benefits commonly given to employees;	Have students prepare a list of common employee benefits. Evaluate these in terms of deductions, costs, and taxation.	COMMON BENEFITS 1. Dental plan 2. Pension plan 3. Health benefits 4. Vacations 5. Social events 6. Severance pay 7. Promotions 8. Training 9. Discounts 10. Time off work 11. Parking 12. Salary continuance 13. Allowances 14. Advances in pay 15. Other
6. understand the need for policies and rules;	Have students identify policies and procedures that they work with in their part-time jobs. Discuss how policies predict behaviors in commonly recurring situations; reduce error; reduce costs; preserve standards; and ensure continuity of business routines. Have students prepare policies/rules for their home/school/job situations.	
7. understand and appreciate the training offered by the employer;	Have students list and compare the various ways in which training may be accomplished while on the job. Discuss the advantages of each method. Have students evaluate the way in which they learn at home/school/store laboratory/or on their part-time job.	METHODS OF TRAINING ON THE JOB 1. Apprenticeships 2. Supervision 3. Criticism 4. Delegation of authority 5. In-services and workshops 6. Courses 7. Assigned responsibility 8. Other
8. assess desirable physical and psychological working conditions;	Have students describe the working conditions at part-time jobs, home, school classrooms, the store-laboratory, or other community activities. List the conditions, and categorize them as physical or/and psychological. Discuss how poor conditions might be improved.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
9. appreciate the advantages of effective guidance and leadership.	Ask students to evaluate their perceptions of the leadership under which they work. Provide case studies to analyze for leadership styles and effects. Have students list the advantages of effective leadership.	ADVANTAGES OF GOOD LEADERSHIP 1. Goal orientation 2. Constructive criticism 3. Provide motivation 4. Provide feedback 5. Provide direction 6. Encourage initiative 7. Other
B. Employee Needs and Contributions The student should be able to:		
1. identify personal needs;	Ask students each to list ten personal needs. Compare the lists to see which needs are common. Discuss how common needs begin to identify a target market group. Have students rank their ten needs and compare the ranked orders.	SAMPLE LIST OF COMMON NEEDS 1. Money (automobile) 2. Friendship 3. Health and safety 4. Opportunities for advancement 5. Working conditions 6. Security 7. Proximity to home 8. Wardrobe 9. Holidays and travel 10. Education and training
2. rank their needs in order of priority;	Have students select a job advertised in the newspaper, and match their need to the features of the advertisement.	
3. match needs to a job description;	Review the "Skills-Needs Model" and discuss how a job might satisfy one's needs, and the consequences of satisfaction. Discuss what students are willing to contribute to the employee-employer relationship. Refer to skills, aptitudes and attitudes.	"Skills-Needs Model," Appendix B
4. match skills and knowledge to job expectations;	Have students determine the difference between needs and wants. Discuss the phenomenon of changing needs over time and circumstance. Ask students to prepare a list of needs, ranked, for a time five years hence. Have students list their skills and knowledge that would serve a particular job. Have them develop a five year plan to estimate the changes that they will need to update their skills and knowledge in the future.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
5. understand the ethic of work for fair pay.	Have students discuss instances of unfair pay that they or their friends may have encountered. Discuss what the employer responsibilities are for fair pay; what the employee responsibilities are for fair pay. Discuss the use and abuse of social insurance, unemployment insurance, welfare, workers' compensation, and other support systems. Have students discuss the wages-costs cycle as an inflationary trend. Discuss this cycle as an economic and ethical dilemma.	WAGE-COSTS CYCLE Wages to Employees → Costs to Employers → Prices for Commodities or Services
6. understand and analyze employer regulations, rules and policies;	Invite a guest speaker to talk to the class about rules, policy, human rights, unionism, or labour laws. Review a handbook obtained from business or a a union/association which describes the rules and regulations of personal conduct. Emphasize the obligation of the employee to read the policy/rules statements. Discuss or debate the justice of the expectations set in rules, regulations, and policy.	SAMPLE RULES TOPICS 1. Punctuality 2. Sick Leave 3. Termination Notice 4. Vacations 5. Pay, and Changing Rates 6. Deportment 7. Grievance Procedures 8. Others
7. develop an inventory of personal skills and knowledge;	Give students an outline for a resumé. Have students match their job resumé to their choice of an advertised position. Assess skills, knowledge, aptitudes and interests, as relative to the job. Have students write a report using a job advertisement, a resumé, and their analysis of the match between the two.	RESUMÉ TOPICS 1. Name, address, telephone number with date/age, weight, height, marital status. 2. Education: Most recent accomplishments first. List areas/courses of special interest to the job.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
		3. Work experience: Most recent jobs first. List all experiences, regardless of formality or remuneration. 4. Avocational interests: several hobbies, sports, artistic endeavours, and pastimes enjoyed. 5. References: Gain permission to list three names, titles (occupations), addresses, and telephone numbers of references. Do not use relatives.
8. understand the importance of innovation and initiative for job advancement.	Have students list their ideas of the qualities for leadership. Help them to categorize these qualities into groups reflecting innovation and initiative. Discuss the concepts of innovation and intiative as the basis for growth on the job. Use case studies to identify and discuss the criteria for promotion.	INNOVATION Innovation refers to the act of introducing something new. INITIATIVE Initiative is the readiness and ability to take the leadership role.
C. Organization Types The student should be able to: 1. identify the characteristics of proprietorship, partnership, corporation, cooperative, and Crown corporation:	Provide students with the characteristics of each type of organization found in business. Have students suggest the advantages/disadvantages of each. Have students list examples of local business enterprises that may be classified as proprietorships, partnerships, corporations, and cooperatives, and determine why certain business types lend themselves to these organizational structures.	BUSINESS ORGANIZATIONS 1. Proprietorship 2. Partnership 3. Corporation(s) -Private (limited) -Public -Crown 4. Cooperatives

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
(a) identify employer-employee relationships in each;	Discuss the ways that one would relate to others in each of these business organizations. The discussion might include: size of the business; complexity of the business; the risk in liability; the need for formality; the extent of member interaction; the personality of members; the need for rules and regulations; and the congruence of goals between the employer and employee.	
2. explain the difference between line, staff, line and staff, and committee structures:	Provide students with examples of the four common organizational charts: line; staff; line and staff; and committee. Have the students select local examples of each type of organizational structure and prepare a chart for that organization. E.g., home (family as an organization), school, school store-laboratory, school division, or local business enterprise.	
(a) identify the employer/ employee relationships;		
(b) identify the employee/ employee relationships;	Discuss the nature of the supervisor-subordinate relationship within each organizational structure. Emphasize the lines of communication, lines of authority, delegation, need for rules, etc. Have students speculate on the human qualities and efficiency qualities of each type of structure.	
	Referring to each type of organizational structure, have students discuss the extent of cooperation, shared responsibilities, social life, and commitment to goals/others/job.	
3. understand and explain the contractual relationship between employer and employee:	Discuss with students the purpose, nature, and elements of employment contracts. Have students research and report on the relationship between employer-employee: Principal and Agent; Master and Servant.	Refer to textbooks on law and economics. Request materials of the Manitoba Government regarding labour laws, codes, and practices: Department of Labour and Manpower, Employment Standards Branch, 401 York Avenue, Winnipeg, Manitoba R3C 0P8.
(a) identify and explain the legal obligations of both parties;		

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
(b) describe the role of unions and associations;	Have students research the background to the growth of unions in Manitoba. Discuss the processes of negotiations between employers and employees, management and union/ association. Identify the advantages and disadvantages of organized labour as it is practiced in Manitoba. Invite guest speakers and/or form a panel discussion to emphasize the contractual relationship between employers and employees. Use case studies as the basis for discussion. Discuss the function(s) of government(s) with regard to employer-employee relationships.	COLLECTIVE BARGAINING . . .the process of bargaining and agreeing upon the terms of a contract with an employer through a group established for that purpose CERTIFICATION . . .the legal consent given to a union of people recognizing its rights to negotiate for the union CONCILIATION . . .the process of assigning to a mutually agreeable board the task of conflict resolution, the outcome of which is not mandatory ARBITRATION . . .the process of assigning to a mutually agreeable board the task of conflict resolution, the outcome being mandatory
IV. EMPLOYEE/EMPLOYEE RELATIONSHIP A. Formal Relationships The student should be able to: 1. identify personnel on an organizational chart;	Have students prepare an organizational chart for a given organization (school, part-time work, school division, other business). Using the chart, have students assign the names and titles to the various positions indicated on the chart. Be sure to include <u>all</u> personnel. Have groups of students do several organizational types (line, staff, line and staff, committee, proprietorship, partnership, corporation(s), cooperatives) so that discussions may follow.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. explain the relationships between personnel:	Using the organizational charts showing personnel by names and titles, have students trace the lines of communication and lines of authority between employees. Discuss with students the differences between organizational types with regard to communication and authority.	
(a) discuss ethics within relationships,	Examine positions for specific job or task orientation rather than generalities of work. Discuss with students the concept of equality between employees on and/or off the job and its effect upon job descriptions. Explore the ideas of loyalty to others and self. Have students relate situations that they perceived to have been unethical, and explain why these situations were unethical. Stress the need for empathy, cooperation, understanding and care necessary for ethical relationships.	
(b) examine acceptable performance standards,	Have students review job descriptions, goals, and expectations associated with specific positions on an organizational chart. Discuss how these features of the position are congruent with other positions on the chart. Discuss with students how standards are supported through policy, goals, procedures, rules, regulations, commitments, trust, recognition, honour and rewards for efforts which are done well. Have students assess how relationships play a part in preserving performance standards that affect how people interact.	
(c) identify communication channels;	Referring to the organizational charts, have students determine the most appropriate channels of communication for corresponding between employees. Have students prepare a list of typical communication media common to employee-employee relationships. Have students trace the way in which employees communicate from the various positions of the organization to all other various positions. Discuss why different channels of communication (and media) might be used for different situations.	TYPICAL COMMUNICATION CHANNELS IN BUSINESS -Interoffice memoranda -Letters -Bulletins -Business forms -Personal notes -Telephone -Oral -Titles -Protocol -Gestures -Deportment -Manuals

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
3. appreciate the need for congruency of goals and objectives.	Ask students to identify reasons that people (employees) would enter into interpersonal conflict. Have students consider actions that might be taken to offset interpersonal conflicts on the job. Discuss the individual nature of personalities. Discuss the need for consistent and predictable behaviours. Explore the various appreciations and values that people may bring with them to a relationship. Have the students assess the functions of the organization as a means to an end, and identify the end or goal toward which the organization directs its efforts. Have the students evaluate how well the employee's goals match those of the organization (or how well <u>their</u> goals match those of the course, the home, the part-time job, etc.).	
B. Informal Relationships The student should be able to: 1. identify informal structures in an organization;	Have students tell about the informal settings and structures that they have observed or participated within, in the various organizations they have encountered, e.g., home, school, store-laboratory or part-time employment situations. Discuss the pros and cons of coffee groups, social committees, support services, counselors, and paternal/maternal sources of advice to be found in an organization. Have students prepare a chart/bulletin board display of the informal organization(s) in an organization, and compare it to the formal organization chart.	
2. examine the impact of personalties of individuals on employees;	Review the lessons taught about personality types. Have students discuss their reactions to people, and the differences between reactions to different people. Ask students to list reasons that they 'get along' with others. Discuss the phenomenon of Stimulus-Response as a basis for reaction, and the idea that an employee must compromise personal values with organizational goals.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
3. describe the importance of employee morale;	Have students relate the feelings that they have under various circumstances while on the job (part-time, classroom situation, or home situation). Ask students to recall instances when they felt <u>good</u> about themselves; when they felt <u>bad</u> about themselves. Have students list ways in which they would prefer to be treated differently from the ways in which they are now treated. Have students speculate on what destroys morale and on what motivators tend to increase morale.	<u>MORALE DEFINED</u> Morale is the mental condition as regards courage, confidence and self-worth.
4. demonstrate social skills in relations with others.	Have students describe (write an essay on) why an increased self-worth leads to increased productivity. List ways that employers might help to encourage employees for the purpose of increasing morale. Have students work in groups of their choice, and as assigned. Have them assess the differences that they perceive within the two group settings. Use case studies related to values and values clarification to provide a theoretical basis for social skills. Have students resolve differences that they might have with others by listing the facts; their feelings; their understanding of the other person's feelings; and a plan for resolution. Prepare selling situations in the classroom or store-laboratory to demonstrate the social skills useful on the job. Have students role-play interview techniques. Use good counselling techniques when interviewing students about marks, projects, or other problems, and point out that these techniques are social skills.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Invite speakers to talk to the class about social skills. Role-play or practice telephone usage and telephoning techniques. Develop exercises for listening to others, and for intelligent responding.	
V. CUSTOMER/SALESPERSON RELATIONSHIP A. Business Policies and Procedures The student should be able to: 1. develop an awareness of business policies and procedures that influence the customer/salesperson relationship;	Ask students to bring to class any handbooks that their employer/union issues to employees regarding policies and procedures for conduct. Have students list policies and procedures that would be commonly used for selling routines; analyze and/or prepare a set of rules to be used for selling situations; and prepare a policy manual to deal with customer/salesperson relationships. Have the class prepare a sales promotion policy to outline a year's sales events. Include an analysis of the type of customer (psychographics and demographics) and the merchandise or service to be offered for sale; the nature of the slogans, headlines, appeals; illustrations, etc.; the guidelines for good taste; the proposed timelines for events.	
2. analyze the effect of business policies and procedures on the customer/salesperson relationship.	Discuss how policies prevent recurring problems in customer/salesperson relationships. Such matters as price, ticketing, the approach, selling techniques, remuneration, and displays are examples. Have students compare local businesses for apparent policies, being careful to list the strengths of each business rather than shortcomings.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Have students discuss/debate the merits of commissioned/non-commissioned sales systems, and the way in which this variable would affect the degree of service that a salesperson is willing to offer. List motivations to assist salespeople in the customer/salesperson relationship other than remuneration.	
B. Business Objectives The student should be able to: 1. understand and explain the need for reasonable profits;	Have students discuss their definition of profit. Students might debate their definition(s) and discuss the aspect of fair and just profits. Discuss the concept of "return on investment" as a basis for markup and profit. Have students discuss the case for a corner grocery store and/or a neighborhood jeweller. Discuss the idea of "whatever the market will bear", and the implications this has for a free enterprise system in an atmosphere of social consciousness. Have students explain the reasons why prices would/should not rise too far under this idea.	PROFIT DEFINED Profit is the excess of returns over costs. FAIR AND JUST PROFIT Fair and just profit is the excess of returns over costs that would be considered "reasonable", given the need to maintain a return on investment ratio adequate to meet capitalization costs.
2. appreciate the value of developing clientele;	Have students define customer and clientele. Discuss how clientele provides a better return on investments, e.g., lower expenses incurred to promote; more sales from satisfied repeat customers; the advantages of word of mouth advertising; changes to the promotional mix of advertising, display, special events and personal selling.	CUSTOMER DEFINED A customer is a patron of a business. CLIENTELE DEFINED The habitual customers of a business are called the clientele.
3. identify and explain ways of extending goodwill;	Have students list ways to extend goodwill.	GOODWILL DEFINED Goodwill is the value that a business places on its clientele.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
4. explain factors that create business image.	Define image. Have students discuss the use of policies to extend goodwill and image. Discuss how location of the business affects image. List other factors that influence image.	WAYS TO EXTEND GOODWILL -C.O.D. sales -Credit sales -Delivery -Layaway sales -Repair service -Washrooms -Maintenance and decor -Location -One-stop shopping -Consultations -Lost and found -Warranties -Alterations -Advice -Demonstrations -Bab, sitting -Coat checking -Doormen -Wrapping -Consistent etnics -Gratuities -Youth involvement -Sponsorships -Other IMAGE DEFINED Image is what others believe (perceive) to be true about a business. SOME FACTORS THAT INFLUENCE IMAGE -Services offered -Decor of business -Logo used -Slogan -Advertising layouts -Location of business -Policies employed -Type of merchandising presentation -Type of product/service sold -Reputation -Product lines (brand or house) -Personal deportment -Music -Current events support -Ability to change -Others

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
C. Customer Contributions The student should be able to: 1. explain the target market concept;	Have students identify the actual customer to whom they would direct a promotion. Describe in detail the demographic and psychographic dimensions of a target market.	TARGET MARKET DEFINED A target market is that section of the market place identified as having unique qualities suited to promotional strategies.
2. analyze the target group: (a) list the psychographic dimensions of the target group; (b) list the demographic dimensions of the target group;	Assist students in conducting a survey to determine the strength of customer demand for a given product(s). Include such criteria as price, brands, and other qualities. Create and/or copy a map of the local business area to be used in a commercial survey. Be sure to identify businesses, apartments, homes, employment locations and service centres. Have surveyed people identified by age, sex, socio-economic status, marital status, income group, education, ethnicity, etc.	
3. develop an awareness of customer needs for goods and services;	From a survey (as outlined above) list the needs of the target market as identified. Be sure to include services as well as goods. Discuss the pros and cons of department stores versus specialty shops in serving customers' needs.	
4. develop an awareness of customer wants;	Differentiate between needs and wants. Discuss with students and list the factors that influence what people want. Discuss the ethics of creating demands. Have students cite examples where they believe people create demand.	WANT DEFINED A want is a desire for. . .something. NEED DEFINED A need is a necessity or lacking for. . .something.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
5. understand the need for and the importance of honesty in business transactions;	Have students relate incidences of dishonesty that they have encountered in business transactions. Identify ways in which customers can be dishonest: thefts; lies; cheating; taking unfair advantage; etc. Discuss the ramifications of dishonesty upon trust and the devaluation of norms/standards. List ways in which customers can practice and/or expect the business transaction to be honest: returns; deposits; security; agreements; repairs; etc.	FACTORS THAT INFLUENCE WANTS 1. Advertising 2. Display 3. Custom 4. Trends and facts 5. Fashion 6. Special events 7. Personal selling 8. Recurrent and repetitive communication 9. Modelling 10. Other
6. assess the customer's ability to buy.	Have students develop a list of criteria that assess one's ability to buy. Use this criteria to discuss probable buying capacities for students for the present and in the future.	CRITERIA: ABILITY TO BUY 1. Capacity: the ability and potential to earn money 2. Capital: the extent to which one owns assets 3. Character: the reputation that one has for repayment
D. Salesperson Contributions The student should be able to:		
1. review and explain selling skills;	Have the students identify the qualities of a salesperson. Discuss with students a "cold call" or manufacturer's approach to selling. Invite a speaker from a distributorship or some segment of the industrial market to discuss selling techniques.	FIVE STEPS OF A RETAIL SALE 1. The approach, and determination of needs 2. The presentation 3. Overcoming objections 4. Closing the sale 5. Suggestion selling
2. understand the need for and the importance of product knowledge;	Have students research and role-play demonstrations of product knowledge in retail, wholesale, and manufacturer situations. Demonstrations should include matching products to customers; building confidence; increasing clientele; enhancing image and goodwill; and meeting competition.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
3. match customer needs and wants to appropriate goods and services;	From an identification of customer needs and wants (a target market analysis) have students practice applying the qualities of products/services to that particular target market group. Discuss how well the product/service matches the target group's needs. Invite guest speakers from a local manufacturer. Obtain a film representing a manufacturer's viewpoint on marketing a product. Debate issues involved in "bigness" versus "specialization", i.e., whether stores' being "all things to all people" is better than their being specialty shops. For example, should supermarkets sell appliances, clothing, and automotive supplies? Why, or why not?	
4. explain how a salesperson creates goodwill; 5. understand how the sales person affects and conveys the business image;	Discuss ways in which the salesperson can create goodwill: honesty, adequate policies, good grooming, exhibiting confidence, friendliness, sincerity, helpfulness - all of which lead to increased value placed on the clientele.	
6. appreciate the need for ethics;	Have the students define ethics. Discuss experiences of unethical practices, and analyze these experiences to determine why they are unethical. Have students bring to class examples of advertisements that would sponsor a debate about the ethics involved. Discuss how ethics is the responsibility of the business and its officers. Have students write an essay dealing with the idea that a business' ethical posture is a reflection of the conduct of its officers.	ETHICS DEFINED Ethics is the study of conduct between individuals and/or groups.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
7. understand the need for the salesperson to exercise good judgment.	Discuss the need for good judgment. Prepare a list of times when good judgment is most likely to be required.	GOOD JUDGMENT IS NEEDED WHEN - 1. There are no policies in effect. 2. Situations are non-specific. 3. Emergencies arise. 4. Timing is critical. 5. The unusual occurs. 6. People confront. 7. Effects of decisions are important. 8. People relate! 9. Other
E. Selling Situations The student should be able to: 1. understand the relationship between the customer and the salesperson in various selling situations.	Have students list various selling situations other than store-oriented personal selling. Discuss how each of the situations differ, are similar, and serve special needs. Identify the types of customers (characteristics) that would be best served by these special forms of selling.	SELLING SITUATIONS 1. Door to door 2. Telephone 3. Pyramid 4. Catalogue 5. Computer assist 6. Vending machines 7. Credit variations 8. Other
F. Follow-Up The student should be able to: 1. understand the need for follow up in the customer/salesperson relationship; 2. identify methods of follow-up;	Develop a form to be used in conjunction with follow-up sales. Such a form should provide data that will: increase sales; maintain clientele; increase goodwill; promote expansion and the desired image. Have students prepare a form to include: the customers' name, address, telephone number; dates of previous purchase(s); items purchased; record of payment; record of service/complaints; response to advertising; use of credit and special offers; record of apparent needs in the short run and long run.	TYPES OF CUSTOMERS 1. Timid 2. Talker 3. Suspicious 4. Trusting 5. Aggressive 6. Knowledgeable 7. Uninformed 8. Other

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
3. appreciate uses of follow-up data.		
VI. BUYER/VENDOR RELATIONSHIPS		
A. Buyer Roles The student should be able to: 1. identify and explain the role of the buyer in a marketing function;	List student responses about the role of the buyer in a marketing function. Have students research the role of a buyer. Prepare a poster/ bulletin board to present the role of the buyer.	<u>BUYER ROLES</u> -Purchasing agent -Forecaster: sales -Forecaster: merchandise costs -Forecaster: expenses -Market analyst -Public relations officer -Fashion coordinator -Management consultant
2. identify various personnel who might act as buyers;	Provide students with a list of a wide range of business enterprises (corner grocery store, franchise restaurant, specialty shop, proprietorship, partnership, small or large cooperative, small limited corporation, large department store, chain of supermarkets, distribution centre for a chain store organization, one-owner jewellery store, etc.). Have students discuss WHO would do the buying in each instance. Prepare a chart to show the relationships between buyer, management or owners, and vendors for each situation.	<u>BUYERS: VARIOUS PERSONNEL</u> -Owner -Team of buyers -Buyer -Senior clerk -Manager -Department manager -Technical specialist -Automated system (computer update)
3. prepare a job description for a buyer; 4. understand the responsibilities of a buyer.	Have students search newspapers for an advertisement that seeks to locate and employ a buyer. Analyze the job requirements cited in the advertisement and have students discuss the requirements. From the discussion, have students list the responsibilities of a buyer.	<u>BUYER DUTIES</u> 1. Buy 2. Analyze packaging 3. Plan displays 4. Maintain image 5. Safeguard taste and reputation 6. Estimate transportation and storage costs

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
B. Buying Situations The student should be able to: 1. understand and explain the techniques used by a buyer; 2. explain the use of shows, exhibits, trips, and conventions; 3. identify various job situations for buyers.	Discuss with students the different techniques that a buyer would use in buying style wear, hardware, perfume, industrial parts; groceries, etc. Have students role-play/ demonstrate the techniques they would use to engage in buying various commodities. If possible, conduct a field trip/tour of a trade show, exhibit. . .or have a buyer visit the class as a guest speaker. Gather and bring to class literature used at trade shows and conventions. Discuss with students the buyer role in government (municipal, provincial, federal), institutions (schools, school boards, hospitals, personal care homes), retail and industrial settings.	
C. Buying Cycle The student should be able to: 1. understand the need for and the importance of the buying cycle; 2. demonstrate the use of a buying cycle.	Have students select a product to be purchased in one of the buying situations, and prepare a report that addresses each step of the buying cycle. Have the students present their findings to the class in a role-play/demonstration setting.	BUYING CYCLE 1. Market research 2. Selection of product 3. Pricing 4. Display planning 5. Advertisement planning 6. Timeliness considerations 7. Sales/Personnel preparation 8. Analysis of sales 9. Re-buying

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
D. Vendors The student should be able to: 1. list local vendors of retail merchandise; 2. discuss the ethics and values common to a buyer-vendor relationship.	Have the students list the vendors local to the school or the salespeople who make "calls" in the local community. Arrange a tour of warehouses or have a salesperson come to the class and discuss the role of the vendor. Have students list the motives of the vendor and the buyer. Evaluate the responsibilities of both and discuss how the buyer vendor relationshop needs to recognize congruent ethical goals.	

CORRELATION OF COURSE CONTENT WITH SUPPORT MATERIALS

COURSE CONTENT	APPROVED TEXTBOOKS Eggland, S.A., and Williams, J.W. Human Relations in Business	Williams, J.W., and Eggland, S.A. Communicating at Work	HISERODT, D. Human Relations in Marketing	OTHER REFERENCES
I. PERSONALITY				
A. Personal Attributes	Chapter 2	Suggested Resources	Chapter 2	Human Relations and Your Career: A Guide to Interpersonal Skills, Johnson
B. Human Relations	Chapter 1		Chapter 1	
C. Industry Expectations			Chapter 3	
II. COMMUNICATIONS				
A. Purpose	Chapter 6	Chapter 1	Chapter 6	Marketing Sales, Promotion and Advertising, Nolan et al. Johnson
B. Definition	Chapter 6	Chapter 1		
C. Types of Communication	Chapter 6	Chapter 1	Chapter 6 and 7	Office Procedures 2000, Westgate
D. Business Forms and Media				Introductory Marketing: A Retail Perspective, Taller Richert et al.
E. The Communication Process	Chapter 6	Chapter 1	Chapter 6	Nolan et al. Marketing in Action, Warmke, et al.
III. EMPLOYER EMPLOYEE RELATIONSHIPS				
A. Employer Contributions	Chapter 4	Chapter 3	Chapter 4	All About Law, Gibson, D.L., and Murphy, T.G. (Toronto: Wiley Publishers, 1977) Richert et al

COURSE CONTENT	APPROVED TEXTBOOKS			OTHER REFERENCES
	Eggland/Williams	Williams/Eggland	Hiserodt, D.	
B. Employee Needs and Contributions	Chapter 4	Chapter 2	Chapter 4	Management and Organization, Sisk Understanding Management, Willings
C. Organization Types	Chapter 4		Chapter 4	Issues in Canadian Business, Sexty (Scarborough: Prentice-Hall, 1979)
IV. EMPLOYEE/EMPLOYEE RELATIONSHIPS				
A. Formal Relationships	Chapter 3	Chapter 5	Chapter 7	
B. Informal Relationships	Chapter 3	Chapter 5	Chapter 7	
V. CUSTOMER/SALESPERSON RELATIONSHIP				
A. Business Policies and Procedures	Chapter 5	Chapter 4	Suggested Resources	Richert et al.
B. Business Objectives	Chapter 5	Chapter 4		Nolan et al.
C. Customer Contributions	Chapter 5	Chapter 4		
D. Salesperson Contributions	Chapter 5	Chapter 4		
E. Selling Situations	Chapter 5			
F. Follow-Up				
VI. BUYER/VENDOR RELATIONSHIPS				
A. Buyer Roles	Suggested Resources	Suggested Resources	Suggested Resources	Richert et al.
B. Buying Situations				Retail Business Management, Gillespie et al.
C. Buying Cycle				
D. Vendors				Marketing 1, Fraser

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GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
I. INTRODUCTION TO MANAGEMENT A. History of Management The student should be able to: 1. trace and explain the chronological development of scientific management: (a) evaluate the impact of the Industrial Revolution; (b) identify the contributions of the pioneers of management; (c) identify and explain other factors influencing the development of management;	Emphasize and discuss the major chronological developments in management. Have the students develop a time chart to trace the chronological development of management from pre-Biblical times to the present. Have the students research the growth, development, and influence of the Industrial Revolution on society and on the development of management concepts. Discuss and identify the contributions of the following: - Charles Babbage (Difference Machine) (Specialization) - Frederick Winslow Taylor (Scientific Method) - Henry Fayol (Principles of Management) - Robert Owen (Paternalistic Human Relations) - George Mayo (Hawthorne Studies) Discuss and explain the influence of external factors on the development of management: International and national affairs, political trends, economic and social trends. Have the students trace the histories of and relate these happenings to the external factors: development of power, immigration to the Western Hemisphere, allocation of resources, pollution and energy crisis.	TOPICS TO CONSIDER IN THE DEVELOPMENT OF MANAGEMENT 1. Early civilizations (Egyptian, Greeks, Romans) 2. Industrial Revolution and the emphasis upon production 3. Scientific method and its impact upon management 4. Human relations management 5. Systems approaches to management 6. Electronic media and their effect upon the timeliness of management

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
(d) identify and discuss the demographic changes in Canada;	Discuss government, cultural, and resource (energy) influences on demography of Canada. Have students research newspapers to examine the shifts of management power from the East to the West. Refer to changes related to population: rural to urban, entry of women into business, minority rights, the prospect of a large number of retirees, etc. Refer to economic influences: income distribution, world war, manufacturing, depresssion and government adjustments, post-world-war "baby boom", inflation, etc.	Newspapers, business and trade magazines
(e) demonstrate an awareness of psychographic dimensions in Canadian society;	Discuss multiculturalism and bilingualism in relation to the Canadian mosaic, changing values, and work ethic. Have students list the ethnic make-up of their classroom, school, and/or community. Select a values issue (e.g, a decision to promote a second language) and discuss the personal inputs likely to emerge from each culture.	
B. Purposes and Objectives for Management The student should be able to:		
1. identify the various emphases of management.	List, discuss, and compare the following emphases of management: production; administration; and human relations. Have students relate their findings about the history of management to these three emphases.	
C. Schools of Thought The student should be able to:		
1. identify and give examples of management schools of thought.	Outline the beliefs which gave rise to the following management schools of thought: mathematical; empirical; social systems; and decision theory.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Have students identify organizations or situations which exemplify each of these four schools of thought. Use case studies or have students write a report on this concept. Indicate that management styles change with the times, the individual manager, and the situation. The schools of thought are theoretical forces, and are found in reality to be combined with other management ideas.	
D. Communication The student should be able to:		
1. construct a communication model:	Provide a communication model with a cyclical approach. Discuss the model and emphasize its applications personally, in business, and in school. Prepare transparencies and/or bulletin board charts of the Communication Model. Relate to students how misunderstandings between themselves and their parents/friends can be analyzed in terms of the model. Extend this idea to discuss how management might better ensure that policies and procedures are followed as expected. Provide case studies and have students prepare a report on how and at what stage in the cycle a misunderstanding commenced.	"Communication Model," Appendix B
(a) identify the various areas where communication may break down;	Identify and discuss the areas of breakdown in communication. Have students give examples for each of the five areas of breakdown.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Emphasize methods of overcoming breakdown in communication. Have students provide the necessary corrective procedures in the communications cycle to minimize misunderstandings.	
(b) apply the model to both business and personal communication;	Encourage the students to apply the communication model in class, in the school store laboratory, in personal communication, and in business transactions.	
II. OBJECTIVES		
A. Purpose		
The student should be able to:		
1. understand the need for, and the importance of, objectives.	Define the term objective.	OBJECTIVE DEFINED
	List and discuss purposes for preparing objectives.	An objective is the end point or goal toward which management directs its efforts.
	Prepare charts/transparencies of the Purposes of Objectives for bulletin display and to highlight classroom discussion.	PURPOSES OF OBJECTIVES 1. To provide directions 2. To support philosophy 3. To ensure management processes 4. To motivate personnel 5. To provide uniform, recognizable intent 6. To provide the basis for measuring success
	Use examples and case studies to illustrate the purposes of objectives.	
B. Preparation		
The student should be able to:		
1. compose objectives to develop logical thought patterns:	Discuss methods of writing objectives. Group Group students and have them list three objectives each for the day's lesson. Later, have them determine to what extent their objectives are measurable.	Gronlund, Norman E. Stating Behavorial Objectives for Classroom Instruction. (New York: Macmillan, 1978)

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
(a) write valid, reliable, measurable, and attainable objectives.	Have the students write personal objectives, objectives related to school, and objectives related to business. In each case explore the possibility for misinterpretation of the goal. (This is a measure of its reliability.) Measure objectives for the desirability of its goal. (This is a measure of its validity.)	CRITERIA FOR EVALUATING OBJECTIVES 1. Is the objective attainable? 2. Is the objective understandable? 3. Does the objective serve a desired purpose (validity)? 4. Will the objective lead to consistent results (reliability)? 5. Is the objective a terminal activity? 6. Can the results be measured? 7. Should the objective be changed?
C. Evaluation The student should be able to: 1. evaluate objectives.	Discuss criteria for evaluating objectives. Have students apply these criteria to the evaluation of their personal objectives related to the school, and to the objectives related to business.	
III. ETHICS A. Bases The student should be able to: 1. define and explain ethics;	Discuss the definition of ethics and explain the relationship of ethics to a person and within a business organization.	ETHICS DEFINED Ethics is the study of conduct between individuals.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. identify areas of ethical concerns.	Discuss the areas of ethical concerns. See newspapers for ethical issues in business, such as labour disputes, pricing or advertising. Have students identify from case studies the areas of ethical concern, and discuss how to minimize unethical occurrences.	AREAS OF ETHICAL CONCERN 1. Compromises to the expense of one or more parties 2. Partial truths 3. Incomplete facts being the basis for decisions 4. Favouritism in delegation 5. Conflicts of interest 6. Dual role relationships 7. Personality conflicts 8. Incongruent objectives 9. Gratuities and their use 10. Custom in management practice
3. identify and examine factors influencing value systems.	Discuss factors in relation to their influence on value systems: cultural variables, nature of community, organizational objectives, education, sex bias, socio-economic status, health, age, occupations, marital status, and inherited traits.	
B. Evaluation The student should be able to:		
1. evaluate objectives in terms of probable outcomes and ethical implications;	Discuss ethics and objectives as counter checks. The study of ethics is a counter measure to the profit/efficiency emphasis of objectives. Have students weigh the ethical issues that may arise if management objectives are unchecked in terms of measuring the value of interpersonal conducts.	
2. explain individual and social responsibilities in decision making.	Discuss the relationship of ethics to decision making. Using case studies, have students explain how a manager must, through the ownership of power and authority, protect others in the decisions that are made. Discuss the manager's responsibilities to the organization, the people close at hand, and the society at large.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Identify and discuss the purpose of a code of ethics. Provide examples of codes of ethics as a base for discussion, and post these on bulletin boards. Discuss how these ethics serve the objectives of the organization.	CODE OF ETHICS A code of ethics provides a framework within which individual members of the group may work toward high standards. Copies of codes of ethics as published by various businesses and organizations
IV. DECISION MAKING		
A. Process		
The student should be able to:		
1. identify and explain the steps in decision making:	Provide and discuss a decision-making process. Use the decision-making process to solve examples of personal, business, and institutional problems. Have the students apply the decision-making process to case studies obtained from newspapers, textbooks, and through observation.	STEPS IN DECISION-MAKING PROCESS 1. Identify problems 2. Gather data 3. Identify alternatives 4. Select an alternative 5. Test and evaluate selected alternative 6. Execute the alternative 7. Re-evaluate the results of the decision
(a) identify problems;	Assist students to isolate symptoms of and from problems. Provide cases that provide obvious symptoms and obscure problems.	
(b) gather data;	Discuss and apply procedures to the gathering of data.	GATHERING DATA 1. Rank the data according to relevance to the problem. 2. Classify data according to desired criteria. 3. Analyze data and eliminate the irrelevant.
(c) identify alternatives;	Discuss and identify several alternatives to solving the problem. Have students brainstorm any alternatives, regardless of logic or applicability.	
(d) select an alternative;	Apply the chosen alternative to solving the problem. Discuss why the chosen alternative meets the problem better than the other alternatives.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
(e) test and evaluate the selected alternative; (f) execute the alternative; (g) re-evaluate the results of the decision;	Have students confirm their choice of alternative by measuring the desired outcome for that which best suits the goals of the decision.	IDENTIFYING ALTERNATIVES 1. Rank alternatives according to estimated strength to resolve the problem. 2. Classify alternatives according to desired criteria. 3. Eliminate alternatives of least value in making the decision.
2. identify other means of making decisions;	Discuss other methods of decision making.	
3. develop an awareness of the application of decision-making theory to creativity in problem solving;	Emphasize the importance of decision making in relation to the process of creative thinking. Explain and discuss how creativity is crucial at the stage when the problem solver "identifies alternatives". Discuss how originality may be a sign of leadership for new methods and new solutions.	OTHER METHODS OF DECISION MAKING 1. Empirical patterns 2. Policies in existence 3. Use of intuition 4. Ignoring problems
4. understand the need for communication in the decision-making process.	Discuss the relationship of decisions and objectives (goals) and the need to involve and to inform all concerned about decisions. Have students review the communications model, and apply it to decision-making cases to determine the effectiveness of having made a decision.	CREATIVE THINKING AND PROBLEM SOLVING: A COMPARISON Creative Thinking / Decision Making 1. Personal need / 1. Definition of a problem 2. Preparation / 2. Analysis of data 3. Incubation / 3. Development of alternate solutions 4. Illumination / 4. Selection of alternative 5. Verification / 5. Execution

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
V. FUNCTIONS OF MANAGEMENT A. Management Cycle The student should be able to: 1. define <u>management</u>;	Define and discuss the importance of management. Emphasize that management is the process of achieving the goals of an organization by utilizing people and other resources. Point out that it is an ongoing and dynamic process.	<u>MANAGEMENT DEFINED</u> Management is the coordination of resources through the process of planning, organizing directing and controlling to meet stated objectives.
2. identify the components of the management cycle.	Provide a model of the management cycle as a handout, transparency or chart for bulletin board. Use the model to discuss the relationship of the components of the management cycle.	"The Management Cycle," Appendix E
VI. PLANNING A. Function The student should be able to: 1. identify planning as a function of the management cycle; 2. define <u>planning</u>.	Review the Management Cycle. Discuss goal setting and consider ways of attaining the goals through the use of the planning function. Emphasize the pervasive relationship of planning to all functions of management. Discuss the relationship of planning to objectives and decision making. Prepare a transparency, handout, or a chart of the definition of planning.	<u>PLANNING DEFINED</u> Planning is an analysis of relevant information from the present and the past and an assessment of probable future developments so that a <u>course of action</u> (plan) may be determined that enables the organization to meet its stated objectives.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
B. Types of Plans The student should be able to: 1. identify and explain the various types of plans.	Discuss the various classifications of plans in respect to characteristics and use or application. From personal plans that students might identify, have them classify their plans in terms of time, function, and scope. Use case problems to analyze plans in a business context.	CLASSIFICATION OF PLANS 1. Time - long-range - short-range 2. Function - sales - production - personnel - finance - miscellaneous 3. Scope - policies - procedures - methods
C. Evaluation of Plans The student should be able to:	List and discuss various criteria for evaluating plans on procedural and economic bases.	
1. identify costs to implement plans;	Have the students identify and discuss the costs involved in implementing plans. Use personal plans or case problems to identify situations giving rise to costs. Have the students prepare personal, school laboratory, and/or business budgets. From budgets, list alternative plans that would be possible for expansion, acquiring assets, personal possessions, etc.	EVALUATING PLANS A. Procedures --- the criteria that would effect the enactment of plans B. Costs --- the dollars needed to implement plans and the expected financial returns
2. estimate expected dollar returns on investment;	Discuss and use various methods of estimating dollar returns on investments.	RETURN ON INVESTMENT $\frac{\text{\$ Profits from Investments}}{\text{\$ Invested}} \times 100 =$ % Return on investment
3. prepare cost analyses;	Discuss and prepare various cost analyses: operating statements, break-even analysis, and return on investment ratios.	"Break-even Analysis," Appendix B

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
4. prepare plans with time lines; 5. estimate the probability of reaching goals; 6. assess plans for their effect on people. 7. evaluate plans for their ethical implications	Have students discuss and develop time lines for achieving personal, school, and business objectives. Using a calendar, prepare a time line for projects, tests and topics in a given course. Similarily, develop a schedule of displays for a year's store promotions. Discuss and assess planning in relation to personnel policies: staffing, development of personnel, compensation of employees, labour-management relations. Have students evaluate the ethical implications of plans in these areas.	"Income Statement," Appendix B
D. Alternatives to Planning The student should be able to: 1. identify procedures, policies, and methods in existence; 2. research the outcomes if no plans were made.	Have students develop a set of procedures that would help to establish precedence for recurring problems. Identify and discuss the implications of the absence of the planning function in the management of one's personal life, the school, and business organizations. Have students list the possible problems that could arise if plans were not made.	
VII. ORGANIZING A. Function The student should be able to: 1. identify organizing as a function of the management cycle;	Review the Management Cycle. Discuss the organizing function in relation to the management cycle and to people, the work to be done, and the resources in order to achieve goals.	"Management Cycle," Appendix B ORGANIZING DEFINED Organizing is the arrangement of work into manageable units so that objectives can be met.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. define <u>organizing</u>.	Emphasize the relationship of organizing to all functions of management. Have students discuss the relationship of organizing to objectives. Speculate on the probable outcomes if management failed to organize. List the advantages of the organizing function.	
B. Organizational Structures The student should be able to: 1. identify and explain the various formal organizational structures;	Identify and discuss the types of formal organizational structures in relation to characteristics and use or application. Prepare a transparency or a chart of each of the four structures: line; staff; line and staff; and committee. Have students provide examples of institutions that use each of these or any combinations thereof.	"Line Organization," "Staff Organization," "Line and Staff Organization," and "Committee Organization," in Appendix B
2. diagram and discuss the various types of formal organizational structures;	Have students collect and/or design organization charts of school, school division, school store laboratory, local businesses, or any other institutions with which they are familiar.	
3. identify and explain informal structures in an organization; 4. identify and discuss ways in which the informal structures function in an organization.	Prepare a display of the charts and discuss in class. Informal organizations are based upon respect for persons who have no legitimate power, but rather hold an image of knowledge, expertise, or trustworthiness. Have students identify a person in whom they have a good deal of confidence regardless of position. Explain how such people are the <u>core</u> of informal organizational structures, and are important in the extent to which they represent power. Discuss how informal structures are best used to enhance the organization of a business to meet desired goals. Use case studies.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
C. Systems Approach The student should be able to: 1. explain the purposes of a systems approach in organizing;	Explain that a systems approach helps to determine the limitations of an organization, the design of the organization, the structure, and the functions. Ask students to list their needs for organizing their next five years of vocational planning. Classify the needs into the six criteria for a systems approach.	A SYSTEMS APPROACH Consider these six criteria when organizing: 1. size of the organization; 2. Personality of the members of the organization; 3. consequence of goals between members and the organization; 4. degree of interaction between members of the organization; 5. level at which decisions are made; 6. state of the system, and the degree to which organizing is needed.
2. identify and explain the criteria for a systems approach to organizational management.		
D. Organizational Theories The student should be able to:		
1. identify and explain Theory "X";	Emphasize and discuss the work-centred approach of Theory X. Have students discuss and evaluate the assumptions of Theory X. Students should list organizations that would best use Theory X management.	
2. identify and explain Theory "Y";	Describe the human-relations approach of Theory Y. Have students identify organizations that would best use Theory Y.	Refer to the writings of Douglas MacGregor, The Human Side of Enterprise (New York: McGraw-Hill, 1960), and R. Blake and Jane Mouton, The Managerial Grid (Houston: Gulf Publishing, 1968)
3. identify and explain Theory "Z";	With student help, prepare posters to illustrate the assumptions and differences between Theory X and Theory Y.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
4. explain modern theoretical models.	Discuss the systems approach of Theory Z. Emphasize that this is not a compromise between Theory X and Theory Y, but rather a different way to consider the organizing function. Have students organize a hypothetical small business using Theory Z to resolve the organizational problems.	THEORY Z - A SYSTEMS APPROACH 1. Size of organization 2. Personality of members 3. Congruence of goals 4. Degree of interaction 5. Level of decision-making 6. State of the system
	Research and discuss other theoretical models for management (PERT, Queuing theory, linear programming, probability and CPM). Have students research these models and how they are used.	
E. Communications		
The student should be able to:	Refer to the previously discussed communications model.	"Communications Model," Appendix E
1. identify and explain a communication model;	Have the students review this model and discuss its application to the organizing function of management.	
2. diagram the flow of information in an organizational chart.	Obtain a sample or diagram an organizational chart and discuss the flow of communication between members of the organization.	
	Emphasize the concept that lines of communication clearly defined and understood promote organizational unity.	
VIII. DIRECTING		
A. Function		
The student should be able to:	Review the Management Cycle.	DIRECTING DEFINED
1. identify directing as a function of the management cycle;	Discuss the function in relation to the management cycle, to people, to the work to be done, and to the resources in order to achieve goals.	Directing is the action of leading, actuating, delegating, and motivating to elicit desired forms of behaviour in striving to meet stated objectives.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Emphasize the relationship of directing to the degree of effectiveness in the planning, organizing, and controlling functions of management. Have students identify <u>why</u> directing is an important function.	
2. identify and explain delegation;	Define <u>delegation</u> and discuss its relationship to people, organization, and attainment of objectives. Discuss the three components of the process of delegation.	<u>DELEGATION DEFINED</u> Delegation is the transfer of authority from superior to subordinate. <u>DELEGATION PROCESS</u> 1. Assign responsibility 2. Extend authority 3. Create accountability
3. understand and explain the relationship between authority and responsibility;	Discuss and define <u>authority</u> and <u>responsibility.</u> Explain the parity concept in the relationship between authority and responsibility. Have students explain why the authority granted to a subordinate must equal the assigned responsibility. Ask students to explain what happens if too much authority is given --- or too little is given in relation to the responsibility.	<u>AUTHORITY DEFINED</u> Authority is the right to command and the power to exact obedience. <u>RESPONSIBILITY DEFINED</u> Responsibility is all of the duties that must be performed to complete a given task.
4. appreciate the need for accountability;	Discuss the importance of accountability to management and the functions of management. Ask students to list several actions for which they are held accountable (e.g., studying, driving or chores). Have students discuss why this is good in helping to motivate people, create a sense of ethics, and to make rewards more justifiable.	<u>ACCOUNTABILITY DEFINED</u> Accountability is the creation of an obligation.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
5. understand the importance of unity of command.	Define and explain unity of command. Discuss the relationship of unity of command to management functions and to accountability. Have students relate their feelings about situations where they are accountable to several people -- mother, father, employer, teacher, principal, etc. Have part-time employment situations analyzed.	UNITY OF COMMAND Each subordinate should be accountable to one and only one superior.
B. Motivation The student should be able to: 1. define motivation; 2. identify the techniques of motivation;	Discuss motivation in relation to management, the functions of management, and the achievement of personal and business objectives. Define motivation. Illustrate the concept of motivation using an equilibrium model. Show various degrees of drive, over-reaction, and continued attempts to seek the status quo or equilibrium point of least tension. Have students list and rank their needs from a job. Determine if these needs are also motivators to succeed.	MOTIVATION DEFINED A motive is a drive, real or imagined, to satisfy a need.
3. identify and rank personal goals;	Refer to Maslow's Hierarchy of Needs model and have students classify their needs and goals in Maslow's hierarchy. Discuss the role that money plays in being able to attain these needs and goals. Have students speculate on the changing patterns of their needs over time.	"Maslow's Hierarchy of Needs," Appendix B
4. identify and explain organization goals;	Have students list the goals for an organization. (Choose a part-time job placement, a case study, or use the store laboratory.)	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
5. explain and evaluate the relationship between personal and organizational goals.	Using the previously developed list of ranked personal needs and the list of organizational goals, have students write a report on how well their goals match those of the organization. Refer to the SKILLS-NEEDS MODEL for discussion.	
C. Evaluation The student should be able to: 1. develop an awareness of ways in which to evaluate the effectiveness of the directing function of management.	Discuss methods of evaluation. Have students relate how they feel they are evaluated by their parents, teachers, and/or employers. If students feel there are injustices, have them report on the discrepancy between the evaluation criteria and goals.	
IX. CONTROLLING A. Function The student should be able to: 1. identify controlling as a function of the management cycle.	Review the Management Cycle. Discuss the controlling function in relation to the management cycle, to people, to work to be done, and to resources in order to achieve goals. Have students itemize the types of controls that their parents use, their teachers use, and their employers use. If a store-laboratory is accessible, have students prepare a list of controls that would help to ensure that store goals are met. Have students write a report on the importance of control in the management cycle, outlining what would result if no control function existed. Use case studies to examine controlling as a management function.	"Management Cycle," Appendix B CONTROLLING DEFINED Controlling is the process of measuring current standards according to expected standards, and of guaranteeing corrective action to be taken to ensure desired standards.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
B. Systems and Procedures		
The student should be able to: 1. identify systems and procedures for controlling basic business operations;	Emphasize that to maintain control in an orderly fashion a number of systems and procedures are necessary. Cite examples such as traffic control, rules in school, and business controls. Have the students list and discuss control systems and procedures that would be used in a small business and/or the school store-laboratory. Specifically, discuss accounting systems, merchandise systems, and systems for dealing with customers/personnel.	Refer to the Handbook of Forms for flowcharts of the systems suggested for a school store laboratory.
2. research systems and procedures for controlling basic business operations;	Procure policy manuals from organizations and businesses. Have students research the policy manuals to obtain information about systems and procedures related to personnel, accounting, merchandising, and general operations (customer complaints, returns, etc.).	
3. prepare systems and procedures for controlling basic business operations.	Have students prepare policy manuals to deal with the systems and procedures for a small store. Prepare reports and flowcharts of systems and procedures. Have students develop accounting and budgeting systems for personal and business use.	
C. Goal Attainment		
The student should be able to: 1. understand the relationship between management objectives and performance; 2. compare current performance to the management objectives.	Review the concept of stated written objectives. Have students write objectives for such business control concerns as: an accounting system; a merchandise system; and personnel/customer relations policies. Evaluate the extent to which one could measure the terminal outcomes of each objective. Have students write objectives for personal goals and indicate precisely when that goal would be reached.	QUESTIONS TO BE ANSWERED IN A WRITTEN OBJECTIVE Who?) What?) Where?) . . . to know that a When?) goal has been reached. Why?) How?)

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
D. Standards The student should be able to: 1. define <u>standard</u>;	Have students identify the standards that are evident in stated objectives. Where there is a desire to upgrade standards, have those objectives rewritten to reflect higher standards.	<u>STANDARD DEFINED</u> A standard is a measure that serves as a model to which one compares performance.
2. understand the importance of standards in the controlling process;	Have students examine control systems in policy manuals and list the standards that are evident or implied.	
3. identify laws and codes that provide guidelines for controls;	In addition to ensuring desired qualities, standards protect people. Have students identify various ways in which standards are established (e.g., codes; past experience; law; statistical inference; endorsements; engineered tolerances). For what purpose do these standards exist? Have students examine "codes of ethics" or rules in policy manuals to identify the quality of control for desired objectives.	
4. understand the need for and the importance of ethics.	Have students evaluate their own writing of a policy manual(s) to ensure that quality outcomes are attainable.	
E. Corrective Action The student should be able to: 1. discuss the purpose of corrective action;	Corrective action refers to the need to have performances aligned with standards set in goals. Discuss the ways in which corrective action may be taken to assist in reaching goals. Have students evaluate systems and procedures in a controlling process, and make several suggestions about how goals might be better met.	
2. evaluate systems and procedures used in the controlling process;	Use a systems approach to evaluate a controlling process. Have students work with case studies to evaluate corrective action that would ensure controls are adequate.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
3. determine the acceptability of results;	Using case studies, policy manuals, or store-laboratory experiences, have students judge the acceptability of results and provide alternative control meassures to offset inadequate controls.	
4. re-plan to correct ineffective systems and procedures.	Invite a security officer from a department store to speak to the class about controls for shrinkage.	
F. Support Information The student should be able to:		
1. identify types of support information for the control function;	Have students list ways in which controls may be implemented. Develop a bulletin board to display how these supports to controls are used.	
2. identify and understand the importance of budgetary and non-budgetary control supports.	Have students identify which controls are useful for financial (budgetary) matters, and which serve other (non-budgetary) matters.	CONTROL SUPPORTS 1. Charts 2. Graphs 3. Schedules 4. Time-lines 5. Rules, regulations 6. Policy manuals 7. Budgets 8. Accounting systems 9. Flow charts 10. Signing authorities 11. Delegation 12. Training 13. Reports 14. Other

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
X. LEADERSHIP		
A. Function		
The student should be able to:		
1. understand the need for and the importance of leadership.	Emphasize that the quality and type of leadership determines the degree of effectiveness in performing the functions of planning, organizing, directing and controlling in the management cycle. Have students list the advantages of effective leadership through each of the four functions of management.	LEADERSHIP DEFINED Leadership is the ability to direct others through the processes of planning, organizing, directing and controlling.
B. Types		
The student should be able to:	Select and discuss examples of leadership in personal situations, school situations, and business situations.	
1. identify the qualities of a leader;	Identify and discuss the qualities of a leader. Help students compile a list of traits associated with leadership. Have the students discuss the question: "Are leaders born or made?".	
2. identify and explain various leadership styles.	Relate leadership styles to organizational theories X, Y, Z. Have students describe the type of leadership that would be exhibited by one who subscribed to Theory X, Theory Y, or to Theory Z. Explain how each style of leadership has some advantages/disadvantages in given situations.	Refer to the writings of Douglas MacGregor, The Human Side of Enterprise (New York: McGraw-Hill, 1960) and of R. Blake and Jane Mouton, The Managerial Grid, (Houston: Gulf Publishing, 1968).
	Have students prepare a leadership profile of selected leaders (e.g., Churchill, Castro, Hitler, Trudeau).	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Give students the opportunity to demonstrate the ability to coordinate classroom/school store laboratory projects, including clarifying instructions, keeping people informed, assuming a leadership role, and developing a clear understanding of objectives.	

CORRELATION OF COURSE CONTENT WITH SUPPORT MATERIALS

	APPROVED TEXTBOOKS			OTHER REFERENCES
COURSE CONTENT	Sisk, H. and Williams, J. Management and Organization	Willings, D. Understanding Management	Knudson et al. Management: An Experiential Approach	
				Retailing Principles and Practices, Richert et al Introductory Marketing: A Retail Perspective, Taller Retail Business Management, Gillespie and Hecht.
I. INTRODUCTION TO MANAGEMENT				
A. History of Management	Chapters 1, 2	Chapter 10, Appendix B	Part VI	Gillespie and Hecht
B. Purposes and Objectives for Management	Chapter 2	Chapters 1, 2	Part II	Gillespie and Hecht
C. Schools of Thought	Chapter 2	Chapters 10, 16, Appendix B.	Part II, Exercise 4	
D. Communication	Chapter 16	Chapters 18, 20	Part I	Gillespie and Hecht Richert et al. Marketing 2, Fraser
II. OBJECTIVES				
A. Purpose	Chapter 4	Chapter 17	Parts II, III	Gillespie and Hecht
B. Preparation	Chapter 4	Chapter 17	Parts II, III	
C. Evaluation	Chapter 4	Chapter 17	Parts II, III	
III. ETHICS				
A. Bases	Chapter 3	Chapter 21	Part III	Gillespie and Hecht
B. Evaluation	Chapter 3	Chapter 21	Part III	

COURSE CONTENT	APPROVED TEXTBOOKS			OTHER REFERENCES
	Sisk and Williams	Willings	Knudson et al.	
IV. DECISION MAKING				
A. Process	Chapter 6	Chapters 13, 14	Part V	Gillespie and Hecht (decision-making case studies in each chapter).
V. FUNCTIONS OF MANAGEMENT				
A. Management Cycle	Chapters 1, 2, 4	Chapters 1, 2	Part I, Exercise 2	
VI. PLANNING				
A. Function	Chapters 4, 5	Chapter 17	Part III	Gillespie and Hecht
B. Types of Plans	Chapters 4, 5	Chapter 17	Part III	
C. Evaluation of Plans	Chapters 4,5, 6	Chapter 17	Part III	
D. Alternatives to Planning	Chapters 4,5,8, 9	Chapters 15, 17	Part III, IV	
VII. ORGANIZING				
A. Function	Chapters 8, 9	Chapter 15	Part IV	Gillespie and Hecht
B. Organizational Structures	Chapters 8, 9	Chapter 15	Part IV	
C. Systems Approach	Chapters 8, 9, 10	Chapter 21	Part IV	
D. Organizational Theories	Chapters 8, 14	Chapter 16		
E. Communications	Chapters 16,8,9, 10	Chapter 20	Part I, Exercise 3	
VIII. DIRECTING				
A. Function	Chapter 11	Chapters 11, 12	Part V	Gillespie and Hecht
B. Motivation	Chapter 15	Chapters 11, 12	Part II, V	
C. Evaluation	Chapters 11, 15	Chapters 11, 12	Part V, Exercise 12	

COURSE CONTENT	APPROVED TEXTBOOKS			OTHER REFERENCES
	Sisk and Williams	Willings	Knudson et al.	
IX. CONTROLLING				
A. Function	Chapters 19, 20, 21	Chapter 3	Parts IV, VI, VII	Gillespie and Hecht
B. Systems and Procedures	Chapters 19, 20, 21	Chapter 3	Parts IV, VI, VII	
C. Goal Attainment	Chapters 19, 20, 21	Chapter 3	Parts IV, VI, VII	
D. Standards	Chapter 19	Chapter 6	Part IV, Exercise 10	
E. Corrective action	Chapter 21	Chapter 22	Part IX, Exercise 19	
F. Support Information	Chapter 20			
X. LEADERSHIP				
A. Function	Chapters 14,15,17, 18	Chapters 14, 16	Parts VI, VII	
B. Types	Chapters 14,15,17, 18	Chapters 14, 16	Parts VI, VII	

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GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
I. PLANNING GOALS A. Target Market The student should be able to: 1. analyze the target market: a) develop a strategy for the analysis; b) construct and administer the measurement instrument; c) classify and sort the measurement data; d) report the findings of the analysis; e) prepare recommendations.	Discuss a research model useful for gathering data for marketing. Have students use the model to conduct a mini research on a hypothetical problem and then ask them to carry out a research project in the school or community, based upon a problem identified in the school store, business community, or other source. Have students identify a product or service that they wish to provide to a specific target group. Help students develop a list of demographic and psychographic criteria that would match the product/service being promoted. Help students develop a rating scale to measure each criterion. Have students design a strategy (questionnaire, interview, observation, etc.) for gathering the research data. On the basis of a good sample of responses, help students to analyze the data, and then ask them to prepare a formal report analyzing the target market.	RESEARCH MODEL 1. Select the topic. 2. Define and state the problem. 3. Review the literature. 4. Prepare the instruments for gathering data. 5. Gather data, sort, and classify. 6. Write a report on the findings. REPORT FORMAT 1. Cover/title page 2. Table of contents 3. Statements of the problem 4. Abstract/summary of the findings 5. Data: a narrative of the procedures of research 6. References, bibliography, and sources

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
B. Finance The student should be able to: 1. plan an appropriate financial system for the budgetary control of funds: a) review the accounting system cycle, and the purposes of accounting; b) plan an accounting system/changes to suit the needs of a particular business;	Have students discuss the needs for planning a financial system and list the advantages of keeping accurate financial records. Have students prepare flowcharts of the financial systems used in a business, showing the flow of information/forms from one source to the other. Depending upon the type of business that the student studies (store-laboratory, cooperative host, case study, seminar project), have the student design a flowchart of the financial system suited to that particular business. Have students prepare a poster/bulletin board display of the accounting equation and accounting cycle as represented by a flowchart. Have students explain how the financial system might be adapted to computer processing. Have students prepare budgets for sales, expenses, and profits for a given period of time.	"Flowchart of Systems", Appendix A ACCOUNTING EQUATION ASSETS = LIABILITIES + OWNER'S EQUITY.
C. Merchandise The student should be able to: 1. plan an appropriate merchandise control system: a) understand the need for and importance of a merchandise control system;	Have students develop a flowchart of the merchandise controls, flow of forms, and accounting processes used in the practical setting(s) open to them (delivery system(s) elected). Have students list advantages of systematizing the flow of goods and the accounting for merchandise. Discuss how evaluation based on a system assists in the controlling and planning functions.	Refer to Appendix A, "Flowchart of Systems"

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
b) identify and categorize the type of service/ merchandise to be sold by the business;	Have students list the products and services offered by a business. Categorize these products into departments according to merchandise types. Identify those items that are basic to the business, and those that would be considered ancillary to the operation. Have students identify likely suppliers for the merchandise assortment.	
c) plan a list of basic stock suited to the business;		
d) prepare a list of suppliers that sell the desired merchandise;		
2. prepare floor plans to identify the display and storage of merchandise;	Using scale drawings of floor plans, or models, have students plan for storage and display of merchandise in a business facility.	
3. prepare a schedule of promotions.	Prepare a schedule of promotions for a semester, school year, calendar year, etc., suited to the business under review. Have students identify promotional events suitable to seasons, special dates, and business cycles, and estimate the costs (budget) for promotions.	
D. Administration		
The student should be able to:	Have students list the services that the business ought to offer customers. Discuss the services by examining the way in which they enhance sales, goodwill, or the image of the business. Weigh these gains against the estimated costs of each service.	GOODWILL DEFINED Goodwill is the value that a business places on its clientele.
1. plan or justify general policies for the operation of the business;		
2. plan or analyze staff controls, job description, and scheduling for the business.	Have students plan routines for dealing with customer services: wrapping, delivery, returns, credit, layaway sales, lounge area, etc. Have students plan for staff placement by preparing job descriptions. By estimating the time required for specific duties, plan for the number and type of staff needed to run the business. Have students prepare criteria for staff evaluation.	IMAGE DEFINED Image is what others believe to be true about a business. CLIENTELE DEFINED Clientele refers to the habitual customers of a business.

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
II. ORGANIZING GOALS		
A. Finance The student should be able to: 1. design a financial/record keeping system: a) identify the subsystems in financial control;	From the rationale developed in planning a financial system, have students identify the type of information that is required of the business and the system that would ensure the production of reports in an appropriate accounting manner.	CRITERIA FOR AN ACCOUNTING MANUAL 1. Forms, journals and ledgers 2. Flowchart of systems 3. Accounting procedures 4. Banking 5. Sales tax accounting 6. Budgets, and use of capital 7. Reporting 8. Income statements and balance sheets
b) design and analyse forms used in accounting: c) prepare a procedure to be used for financial systems;	Have students identify and design the forms necessary to the operation of the business: journals; ledgers; reconciliations; inventory sheets; budgets; operating statements (income statements); balance sheet; etc. Help students to create a set of files that would accommodate the flow of forms and financial records to assist the accounting function.	
2. organize an accounting policy manual.	Have students prepare a financial manual to display, explain, and discuss the use of forms, procedures, and data generated for financial purposes.	
B. Merchandise The student should be able to: 1. design a merchandise control system: a) assign merchandise assortments to the floor plan,	Using the plans and list of advantages for systematizing the merchandise control system, have students organize the creation of stock books to list the merchandise assortment. Categorize the merchandise into departmental stock books by basic/ancillary merchandise. Have students prepare diagrams or scale drawings of the floor plan, and indicate the placements of fixtures, merchandise for sale, and merchandise/supplies in storage.	CRITERIA FOR A MERCHANDISE MANUAL 1. Forms 2. Flowchart of systems 3. Basic stock 4. Stock book usage 5. Marking and pricing 6. Display and store layout 7. Storage 8. Promotions 9. Inventory taking 10. List of suppliers
b) designate departments and merchandise to specific stock numbers;		

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
c) prepare a plan for the maintenance, storage, and uses of promotional materials;	Have students prepare lists of merchandise and props necessary for promotions.	
2. organize a merchandise policy manual.	Discuss the advantages of a policy manual for merchandise management issues. Identify criteria that a manual should include. Have students analyze or prepare a merchandise manual suited to the business under review.	
C. Administration		
The student should be able to:		
1. organize a policy manual for general administrative problems;	Have students analyze/prepare an administrative policy manual to deal with policy other than finance or merchandise systems. Develop criteria to use in preparing the manual.	CRITERIA FOR A PERSONNEL/ADMINISTRATION MANUAL
2. formulate plans and controls for organizing staff duties and for training and evaluation.	Have students organize and write a personnel/ administration manual.	1. Employer expectations, philosophy, and goals 2. Job titles and descriptions 3. Evaluation and training of staff 4. Handling customers 5. Returns and adjustments 6. Customer services

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
III. DIRECTING GOALS		
A. Finance		
The student should be able to:	Have students discuss the advantages of delegations in a financial system. Include the ideas of security, workload, sequencing, and timeliness.	
1. delegate or record the responsibilities for controls to the accounting function;	Using a hypothetical business situation (or from the analysis of a business under review), have students assign specific accounting duties to staff the various needs of the business. Check that these duties coincide with the personnel/administration duties.	
2. assign specific systems, subsystems, and duties to staff.		
B. Merchandise		
The student should be able to:	Have students consider the business under review to identify the way in which they would delegate duties to staff in the merchandising function. Assist students by providing some basis for systematizing the delegation: flow of merchandise through the business; stages of treatment such as receiving, marking, warehousing, display, promoting; or any other criteria.	
1. delegate or record the responsibilities for controls to the merchandising function,	Check that the nature of duties delegated to staff are included in the personnel/administration manual.	
2. assign specific duties to staff.		
C. Administration		
The student should be able to:	Using role-play, have students interview each other for a job. Help students by preparing, with their assistance, an interview guide suited to the criteria set out in the personnel/administration manual.	
1. delegate or summarize the daily routines for staff;	Have students verbalize the duties, responsibilities, and expectations that the employer has for a specific job.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
2. delegate or record the responsibility for controls to the personnel function.	Help students to prepare a staff evaluation form: checklist, anecdotal criteria; etc.	
IV. CONTROLLING GOALS		
A. Finance		
The student should be able to:	Provide students with income statements, balance sheets, and various journals or ledgers, and have them discuss the financial position of the business.	
1. review or analyze the effect of financial control;	Have students review the flowchart or diagram of financial systems and procedures to assess the efficiency of the accounting function.	SOME AREAS OF ERROR IN FINANCIAL OPERATIONS 1. Cash register procedures 2. Making change 3. Preparing credit sales 4. Reconciling cash 5. Posting, and checking totals 6. Arithmetic functions 7. Preparing statements 8. Ordering 9. Receiving and checking 10. Marking and ticketing 11. Storage and handling 12. Inventory Procedures 13. Banking and reconciling 14. Handling adjustments 15. Security 16. Use of capital (management) 17. Use of terms of credit
2. review or record alternate measures to increase the efficiency in financial controls;	Prepare recommendations for change or improvements.	
3. summarize short-run and long-run results expected from the analysis of records;	Assist students in preparing short-run and long-run financial plans based upon the results of analysis. Prepare budgets for sales, expenses, profits, and capitalization with depreciation schedules.	
4. review the accounting manual and change policy where needed.	Have students alter policies in the accounting manual, if necessary, and write a major "report" to summarize the state of the financial controls being used.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
B. Merchandise The student should be able to: 1. review or analyze the effect of merchandise control; 2. analyze the merchandise controls and prepare alternatives where needed; 3. prepare a summary of short-run and long-run results expected from the analysis of records; 4. review and/or change policies in the merchandise manual.	Have students prepare a list of ways to control for errors in merchandising handling. Prepare "routines" for each of the areas of error and illustrate the routines by making posters or inserts for the merchandise manual. Assist students in the preparation of a formal report to summarize short- and long-run merchandise controls necessary to ensure continued effectiveness. Ask students to prepare a budget for buying (dollar value and/or unit criteria) in terms of short and longer periods of time, and to review the promotions schedule and update where necessary. Have students recommend and prepare necessary changes for the merchandise policy manual.	
C. Administration The student should be able to: 1. justify the job descriptions through an analysis of personnel effectiveness; 2. review and/or analyze the customer-handling procedures from a record of sales, complaints, and other feedback; 3. review the personnel/administration manual and change policy where needed.	Have student use the evaluation criteria developed earlier to role-play evaluating other students (junior students in the program, each other, or hypothetical situations). Assist the students in preparing standards that would dictate the point at which remedial training (or some other action) would occur. Have students determine how well the evaluation for a position suits the description for the position. Based on the degree and nature of customer complaints, returns, and noticeable changes in sales trends, have students evaluate the effectiveness of customer-handling policies and procedures. Have students review, and update where needed, the personnel/administration policy manual.	SOME AREAS OF ERROR IN MERCHANDISE HANDLING 1. Handling 2. Checking and receiving 3. Invoice costing, extensions, and transportation of figures 4. Posting to journals 5. Ticketing and pricing 6. Appropriate display and storage 7. Shoplifting and other security measures 8. Cashiering 9. Wrapping, packing, and delivery 10. Handling returns, allowances, discounts, and adjustments 11. Market analysis, trends, fads, and fashion determination

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
V. GENERAL GOALS A. Management in Practice The student should be able to:	Regardless of the optional delivery system elected, the students should continue to explore concerns related to social awareness and ethical responsibilities of business.	ETHICS DEFINED Ethics is the study of conduct between individuals.
1. explore the effects of ethics in business;	Stress the fact that the image and identity of a business is largely a reflection of the conduct of its officers and staff.	MANAGEMENT FUNCTIONS 1. Planning 2. Organizing 3. Directing 4. Controlling
2. amalgamate the various systems and procedures found in the various departments of the business;	Have students describe the systems for managing the various functions (merchandising, financial, and administering). Discuss the interdependency of those management systems and functions.	
3. report on the understanding of job requirements, duties, and potential opportunities;	Have students constantly monitor job requirements, job opportunities, and employment trends relevant to their vocational goals. Students should continue to evaluate their aptitudes and abilities to serve various job requirements. Assist students to assess their needs and the way in which jobs might satisfy those needs.	
4. report on the effectiveness of using the managerial functions of planning, organizing, directing, and controlling.	Have students repeatedly use the managerial functions (planning, organizing, directing, and controlling), and recognize the advantages of this cycle of the functions. Emphasize the need to systematize decision making so that steps in the management process are not overlooked.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
VI. PRACTICUM DELIVERY SYSTEMS (OPTIONS) A. Store Laboratory Management Schools which have a store laboratory for the marketing program may decide to have students participate in the daily operations of this facility in order to gain experience in and understanding of the principles and practices of marketing (Marketing Practicum 302). Depending on the local needs and resources available, some schools may choose to use the store laboratory in conjunction with one or both of the other optional delivery systems (Cooperative Work Education and Business Feasibility Seminar). Regardless of the delivery system(s) employed, however, the planning, organizing, directing, controlling, and general goals of the program as outlined in the preceding pages should be maintained.		
	Refer to Planning Goals, I-A, B, C, and D, and Organizing Goals, II - A, B, and C.	Handbooks of Forms
The student should be able to:		
1. plan sales budgets and expense budgets,	Have students review the research of target market variables (psychographic, demographic) before preparing budgets. Based upon the analysis of school population clientele, have students prepare store laboratory sales budgets on a monthly, special season, semester, and/or yearly basis. The sales ought to be budgeted in terms of departments, cash and/or charge sales, and any other criteria to be considered (e.g., layaway, sales, returns, etc.). Review the procedures for handling sales tax remittance.	"Sample Budget Form," Appendix A
2. plan staff requirements;	Have students prepare schedules for staffing the store laboratory. Using the job descriptions prepared for the various duties/jobs to be included in the store-laboratory, help students determine the staff requirements for any given period of time. Having determined staff requirements for the program, ask students to assign Retailing 102 students as clerks, Promotions 202 students as advertising agency	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	personnel, and Practicum 302 students as supervisors. The implementation of "rotating shifts" may be required to facilitate the exposure of all students to all of the various experiences. Post the duty rosters on a bulletin board. Prepare an attendance record and evaluation checklist for store staff.	
3. plan a promotional timeline;	Help students prepare a calendar of events that would encompass the school year/semester. Prepare a list of seasonal, special, and school events planned for the time period.	SAMPLE LIST OF EVENTS 1. Back-to-school 2. Fall Fashions 3. Halloween 4. Rembrance Day 5. Thanksgiving 6. Christmas 7. New Year's Eve 8. "White" Sale Clearance 9. Valentine Day 10. St. Patrick's Day 11. Spring Fashions 12. Vocational Choices(Career Day) 13. Father's Day 14. Graduation
4. plan a series of promotional features;	Have students prepare a promotional timeline complete with the series of promotions to be implemented, the appropriate dates for the sales event, the necessary lead times, the names of each promotional event, the theme, and the merchandise/services to be emphasized. Prepare a chart of the promotional timeline to display the long-term considerations. This will assist to remind students of their promotion commitments, the lead-time, and the tasks necessary in preparing merchandise, props, fliers, displays and special events.	"Sample Promotional Timeline," Appendix A
	Have students plan policy manuals to serve store-laboratory systems in the areas of accounting/finance; merchandising, and general administration. By assessing the peculiarities of the board/school policies with regard to the handling of funds, time-tabling, and use of the store laboratory, have students design systems and procedures for operating the store laboratory. Prepare and display a flowchart of the accounting and merchandise handling systems.	
	Assist students in the preparation of forms to be used in the store laboratory.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Have students prepare alternative floor plans of the store laboratory, and discuss the relative advantages/disadvantages of each. Using the forms designed for stock-book control, have students plan the merchandise assortments (basic and ancillary), and compile a list of suppliers for the merchandise to be purchased. Prepare graphs (to convey the status of sales, expenses, profits) that may be updated periodically.	
5. delegate daily cashier duties;	Refer to Directing Goals III - A, B, and C. Using the systems and procedures outlined in the accounting policy manual, have students prepare learning activity packages/drills to be used in training store-laboratory clerks to operate the cash register. Review and emphasize security in handling cash.	
6. delegate daily reconciliation duties;	By referring to the duty-roster/schedule for store-laboratory staff, have students rotate staff through the experiences necessary in the daily operation of the store-laboratory.	SUGGESTED HOUSEKEEPING DUTIES 1. Vacuuming floors 2. Sweeping floors 3. Mopping/washing floors 4. Dusting fixtures and equipment 5. Servicing equipment 6. Emptying garbage 7. Cleaning glass on showcases 8. Cleaning doors and windows 9. Straightening merchandise and organizing shelves 10. Cleaning woodwork and counters 11. Rotating stock
7. delegate daily banking duties;	Have students delegate and supervise the daily reconciliation of sales. Delegate to suitable students the daily banking function (sales to the school office or directly to the bank).	
	Using the administration/personnel policy manual, have students review and prepare job descriptions for staff and delegate duties accordingly.	
8. delegate markdown authorization;	Using the form developed to record the write-off of merchandise (markdowns), have students delegate to staff the authority and limitations for merchandise markdowns.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
9. delegate daily housekeeping duties;	Have students prepare lists of housekeeping duties, delegate these to staff in the store laboratory and prepare checklists to be used in delegating the various housekeeping duties on a rotation basis. As necessary, review and discuss with students techniques for delegating to staff. Reference should be made to the other marketing courses, particularly Management 302.	
10. delegate the preparation of display timeline;	Have students prepare criteria and detailed instructions for the Promotions 202 class to consider in preparing the display timeline. Establish the use of the Promotions 202 class as an "ad agency", and have the Marketing Practicum 302 students negotiate with them for promotion problems and projects.	DISPLAY TIMELINE The calendar of dates and schedule of displays to put in window areas, and into the interior display areas regardless of full promotional efforts
11. delegate promotions schedule and requirements;	Have students refer to past inventories (to determine slow-moving items of merchandise); the calendar of seasonal events, special events and school events; and the identification of themes for promotions. Have students review these criteria with the Promotions 202 class and adjust the schedule for promotions for the year. Refer to the promotional timeline that students planned.	SCHEDULE OF PROMOTIONS The calendar of dates and schedule of displays, special activities, advertisements, and personal selling to be employed throughout the school year/semester
12. delegate periodic inventory taking;	Referring to the merchandise policy manual, have students prepare a list of instructions and procedures to be given to staff by way of training for inventory taking. Have students conduct workshops with the staff that would take inventory (Retailing 102), and prepare and administer training exercises using the store laboratory inventory forms. Have students supervise inventory taking by assigning staff to groups of checkers, etc.	Appendix A: Handbook of Forms - Inventory sheets/ stock-book sheets

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
13. delegate periodic stock checks;	Have students organize a schedule for periodic stock-checks of each department. Help the students to assign stock-check duties to Retailing 102 students on a rotation basis so that all students participate. Using stock-book sheets, have students prepare training exercises to administer to staff. Delegate stock-checks to staff, supervise, and assign teams of checkers to confirm the stock taker's counts.	
14. evaluate daily sales activity by supervising the store-laboratory;	Refer to the Controlling Goals, IV - A, B, and C. Assign students to the "duty roster" as supervisors within the store-laboratory. Have students prepare reports and make recommendations about the daily operations of the store laboratory; Using group discussion (conference/board structure) discuss with students the problems and practices of daily sales operations: checkout procedures; cash handling; customer handling; security; housekeeping; etc. Maintain records of staff performance.	"Bank Reconciliation," Appendix A
15. evaluate daily sales reconciliations;	Stress that supervisory personnel should be willing and able to perform the tasks that they assign to others. Having followed the procedures as outlined in the accounting policy manual, have students review the daily sales reconciliation with the staff who complete the form. Have students ascertain the nature and extent of error, correct, and re-instruct the staff members who made the errors. Maintain records of staff performance.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
16. evaluate bank reconciliations;	Have students prepare a bank reconciliation (if money is banked from the store-laboratory). By referring to the accounting policy manual, have students account for deposits made, cheques cashed, service charges, and outstanding balances. Prepare a flowchart diagram to illustrate the relationship between components of the bank reconciliation and the flows of cash within a business and between businesses, banks, suppliers, etc.	
17. review cheque handling procedures;	Have students review the procedure for handling cheques. Refer to the accounting policy manual/ administration policy manual for policy and procedures. All authorization for accepting cheques should be left with the teacher as well as designated staff.	
18. evaluate the rate and nature of merchandise markdowns;	Using the markdown form, have students review the extent of merchandise depreciation and analyze the reasons for markdowns. Where excessive markdowns are evident, prepare the necessary steps to reduce the shrinkage.	Appendix A, "Merchandise Depreciation," and "Display Evaluation" forms.
19. supervise daily housekeeping; 20. supervise and evaluate staff appointed to operate the store laboratory;	Refer to the GENERAL GOALS, V-A and to the list of Suggested Housekeeping Duties, VI-A(9). Have students evaluate how well staff perform housekeeping duties. Students should include these duties on their evaluation forms used to grade staff performance. Help students in the preparation of evaluation forms.	
21. evaluate displays in terms of technical excellence and goals;	Using a Display Evaluation Form as found in the merchandise policy manual, have students evaluate displays. Assign marks to staff based upon the components of a display.	
22. evaluate promotions in terms of goals;	Prepare an evaluation form to grade the value of a promotion in terms of the grade assigned to the display, the value of the advertisement media, the effectiveness of staff using personal selling techniques, and the worthiness of special activities.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Promotions should be measured in terms of the stated goals for the promotion, the obvious and appropriate treatment of the theme, and the effectiveness upon sales, image, and goodwill.	
23. evaluate sales, expenses, and levels of inventory through the preparation of periodic income statements;	Using the appropriate forms, have students prepare income statements from periodic analysis of the store-laboratory. Develop with students a schedule of procedures to follow in preparing for and administering a period-end inventory and preparation of the income statement.	
	Have students design a flowchart of the relationships between accounts in the merchandise/accounting functions of the store laboratory.	Appendix A, Flowchart of Systems, Income Statement Form, Expense Form, Sales Summaries, Purchases, Inventory Sheets, Balance Sheets.
24. evaluate growth through the preparation of a balance sheet;	Prepare a Balance Sheet.	
25. evaluate staff in terms of industry, initiative, punctuality, and conduct appropriate to the work-place;	Using the staff evaluation form suggested in the personnel/administration manual, have students evaluate the staff that serve on their shift of the duty roster. Have students review their evaluation with the staff and the teacher as a group. Students should be prepared to offer ideas for the elimination of staff weaknesses. Assessment of the evaluation form should be monitored.	
26. prepare financial statements and reports for presentation.	At the end of an accounting period, and after the preparation of income statements, balance sheets, and other evaluations have students present their statements to the class as a whole. Using the committee or board structure for grouping, have students discuss and defend their assessments.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Using the financial statements and reports, have students prepare charts/graphs to illustrate trends and results. Plan corrective action to be considered during the next management cycle.	
B. Cooperative Work Education		
Schools that do not provide the marketing program with a store laboratory, but that wish to maximize the practical application of principles, may choose to have students employ the theories and practices of management (Marketing Practicum 302) by participating in business concerns within the community. Arrangements for host employers, timetables, visitations, and other concerns of cooperative work education must be considered before electing this option.		
As with the Store Laboratory Management option, Cooperative Work Education may be used in conjunction with one or both of the other delivery systems, depending on local needs and resources. Again the planning, organizing, directing, controlling and general goals of the course should be maintained.		
Students should review report-writing skills for this delivery system.		
The student should be able to:		Refer to the Department of Education provincial handbook, "Guide for Work Education in Manitoba Public Schools," available in your school.
1. participate in the following daily sales activities: cash register operation; charge sales; and personal selling;	Refer to General Goals, V-A. Have the students arrange with the host-employers to participate in cashiering and personal selling. Wherever possible, have the students perform as many daily duties as is normal to the business, including the housekeeping functions.	
2. participate in housekeeping activities;		Refer to the "Teacher-Coordinated Checklists for Work Education" available at the Department of Education Library, 1181 Portage Avenue, Winnipeg, Man. R3G 0T3..
* 3. report on the promotional events used by the host employer;	Refer to Planning Goals, I-C; Organizing Goals, II-B, Directing Goals, III-B; and Controlling Goals, IV-B.	SUGGESTED HOUSEKEEPING DUTIES 1. Vacuuming floors 2. Sweeping floors 3. Mopping/washing floors 4. Dusting fixtures and equipment 5. Servicing equipment
*Note: Written reports required.		

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
4. participate in receiving functions; 5. assist in marking merchandise; 6. participate in stock-checking/inventory duties;	Have students write a report outlining the blend of promotional activities used by the host-employer. In the report, the student should categorize the activities observed in display; advertising; personal selling; and special activities. Prepare a scrapbook of promotional events witnessed during the cooperative experience. Make arrangements with the host employer to have the students work in the receiving area of the business. Prepare an outline of tasks for the student to perform/ observe. Have students arrange to assist with the marking of merchandise. In agreement with the host employers, have the students perform as much of the marking function as is possible: preparing tickets; checking the extensions of invoices; working with codes; checking the congruence between orders/invoices/merchandise shipped; and placing tickets on merchandise; operating tagging/marking machines; preparing price lists; updating stock books; etc. Where possible have students prepare a portfolio of activities, samples and procedures. Where the situation at the work station permits, have the student arrange with the host employer to participate in periodic stock-checks and/or inventory taking. Attempt to have the students perform these functions within the host employers' systems, or using a student-developed system.	6. Emptying garbage 7. Cleaning glass and show cases 8. Cleaning doors and windows 9. Straightening merchandise and organizing shelves 10. Cleaning woodwork and counters 11. Rotating stock RECEIVING FUNCTIONS -Security -Unloading merchandise into piles of similar items -Checking the shipment to the bill of lading -Securing copies of forms, and filing -Moving the shipment to marking areas
* 7. report on the construction and use of displays; 8. prepare display materials and promotional aids;	Have the students prepare reports on the construction and use of display. If possible, arrange with the host-employer to have the students plan and implement displays at their work stations. The reports should include: purpose of the display, materials used (props); product or service promoted; sketch/photograph of the display; evaluation by host-employer;	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
* 9. evaluate a display;	and the estimated effect of the display upon sales, image, and goodwill. Have each student prepare a portfolio of display ideas used or witnessed at his or her cooperative location. If a student is unable to participate in display creation, have the student prepare the report as a recommendation for a promotional strategy.	Refer to Appendix B, "Display Evaluation Form."
* 10. prepare an estimated sales budget for a significant time period;	Refer to Planning Goals, I-B; Organizing Goals II-A; and Controlling Goals, IV-A. Make arrangements with the host employer to provide the student with sufficient data (real or hypothetical) to prepare a sales budget. Have each student prepare and complete a budget form to include the criteria used by the host-employer: departments; cash/credit/layaway sales; etc.	Refer to Appendix A, "Budget Form"
* 11. prepare an estimated expense budget for a time period equal to the time period for the sales budget;	With the cooperation of the host employer, have students prepare expense budgets using real or hypothetical data. Classify the expenses into groupings significant to the host-business. Have students complete budget forms for expenses. Prepare specific schedules as needed to record special or sub-categories of expenses. Have students submit written report(s) on their analysis of budgets-sales/expenses/profits.	
* 12. report on forms used in the accounting system; including a procedural flowchart;	Make arrangements with the host-employer to have the student trace the flow of forms/accounts used in the accounting system. Have the student prepare a flowchart of the system used. If there are concerns about the confidential nature of the financial position of the host-employer, request that the student obtain the <u>procedures</u> rather than figures in this analysis.	Refer to Appendix A, "Flowchart of Systems."
*Note: Written reports required.		

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Have the student prepare a report to include a list of forms/accounts used; a flowchart of the relationships between forms and accounts; sample forms; and an analysis of the procedure with any recommendations for change.	
* 13. report on the target market and the effectiveness of promotions to that group;	Have the student write a report about the match between the target market and the promotional mix used by the host-employer. The report should include an analysis of the target market served (demographic/psychographic characteristics); the type of advertising/media used; the displays used; the use of personal selling; special activities (publicity, gratuities, etc.); the use of a theme, slogan, or trademark/logo; and the estimated effect of the promotional mix.	
* 14. report on the staff placement and job descriptions;	Refer to Planning Goals, I-D; Organized Goals, II-C; Directing Goals, III-C; and Controlling Goals, IV-C. Have students write a report that assesses job descriptions, staff placement, and how well staff are suited to the job description. Discuss the relationships between skills and needs and how well these are matched.	
* 15. report on the management viewpoint to evaluate staff;	Discuss the Skills-Needs Model and have students prepare a report including those issues represented on the model.	Refer to Appendix B: "Skills-Needs Model."
* 16. prepare a summary of the written reports.	Have each student use good report format to complete a summary report of the written reports (objectives 1, 2, 3, 4, 5, 9, 11, 14, and 15). This summary should be presented for evaluation to a panel of fellow students, host-employer(s) and the teacher.	REPORT FORMAT 1. Cover/title page 2. Table of contents 3. Statement of the problem 4. Summary of findings 5. Data (the narrative of the procedures of research) 6. References; bibliography and other acknowledgements
*Note: Written reports required.		

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
C. Business Feasibility Seminar This option is designed for schools that do not have ready access to a Cooperative Work Education work station nor to a store laboratory in which students may have experience in the theories and practices of management. At the same time, depending on local needs and resources, some schools may choose to provide a Business Feasibility Seminar option in conjunction with one or both of the other optional delivery systems. Regardless of the system employed, however, the planning, organizing, directing, controlling, and general goals previously outlined for Marketing Practicum 302 should be followed. The Business Feasibility Seminar is ideal for students having above- or below-average abilities. It is desirable that the teacher first diagnose each student's abilities and on that basis prescribe individual performance standards. For the above-average student the seminar would provide an accelerated opportunty for leadership and managerial study. For the below-average student, the seminar would provide the opportunity to develop skills in writing, organizing, communicating, and human relations. Seminars should be conducted in groups of four. Projects undertaken may relate to the feasibility of any type of business activity - manufacturing, wholesaling, retailing, distributing, proprietorship, partnership, corporation, franchise, service, or merchandise sales. Students should review research and report writing skills before beginning this option. At its termination, the entire work of the seminar should be contained within one extensive report.		
The student should be able to: 1. prepare an outline for the research report;	Have students prepare an outline for the research report based on the following criteria negotiated with the teacher: format of the report; sequence of investigation; purpose of the research report; feasibility of the research report; examples for inclusion in the research report; recommendations; and acknowledgements. Hold sessions with the students to discuss report writing and research techniques. Conduct tours of the library so that all students understand how to use the resources.	REPORT FORMAT 1. Cover/title page 2. Table of contents 3. Statement of the problem 4. Abstract/summary of findings 5. Data: a narrative of the research procedures 6. References, bibliography and acknowledgements

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	Complete a list of other resources that might be gathered for classroom use. Compile a list of pertinent guest speakers and/or field trips that would support the set of objectives in this optional delivery system.	VARIABLES
2. conduct marketing research to prove the need for the proposed business: a) select a sample; b) construct a measurement instrument; c) develop a technique for using the instrument; d) test the instrument; e) revise the instrument; f) conduct the research;	Have the students identify the type(s) of business that they might wish to study. Divide the list into categories (merchandise types, services) and resolve differences so that groups of two to four students per seminar group are formed. A feasibility seminar should be attempted by a group rather than individually. Assist the students in specifying in detail the type of business that they are going to investigate. By considering the variables that bear upon the business, have the students analyze the target market. Have students list the demographic and psychographic considerations to identify the target market as precisely as possible. Help the students to devise a technique for sampling the population (school population sample or a sample of a community). Have students construct an instrument to measure the sample for those data that are desired. Have students consider the nature of the sample, the type of information wanted, and the format to be used in the construction of the instrument. Help students rehearse the use of the measurement instrument. Test the instrument by using it on a small field-test sample. Analyze the data for validity and an estimate of reliability. Have students suggest any changes that might be required of the measurement instrument. At an appropriate time, have the seminar group conduct their research: gather the sample data; sort data; classify data; write a report with recommendations/conclusions.	A. Controllable Variables 1. Product to be sold 2. Place of business 3. Price to be charged 4. Promotional mix to be used B. Uncontrollable Variables 1. Cultural and social environments 2. Economic environment 3. Existing competition 4. Available resources/goods 5. Political/legal environment C. Focus 1. The customer Source: E.J. McCarthy, 1969. SOME MEASURING INSTRUMENTS 1. Questionnaires 2. Interviews 3. Experimentation 4. Count and Classify 5. Observe behavior 6. Analyze patterns in business results and traffic

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
3. outline a promotional and marketing mix for the proposed business;	Have students prepare a Merchandise Policy Manual to provide guidelines regarding merchandise handling, marking criteria, promotional policies, and display criteria. On the basis of the variables identified in the market analysis, have students provide a list of criteria to establish marketing mix. Referring to each of the four variables in the marketing mix, have students outline the nature of the product to be sold; the rationale behind the location to be used; the price line(s) to be offered; and the nature and extent of display, advertising, and special activities to be employed. Students should report on the need for and use of personal selling techniques. Have students prepare promotional timelines, a schedule of displays, and a list of suppliers for promotional merchandise as well as merchandise for sale under normal conditions.	RESEARCH MODEL 1. Identify the topic/area of special interest to be investigated. 2. Define and state the problem(s) in the interest of setting a goal(s). 3. Search the literature for similar research already done. 4. Prepare the instrument for gathering data. 5. Gather data, sort, and classify. 6. Write a report on the findings. MARKETING MIX 1. Product) to be used and 2. Place) suited to the 3. Price) type of customer 4. Promotions) identified as) "target"
4. provide reports on the procurement and the cost of land, buildings, fixtures, capital, and inventories;	Have students report on the rationale and procedures followed in locating the business site. Costs should include capitalization or rents for land and buildings. These data should be presented with amortization schedules if necessary. Have students research the literature of federal, provincial and financial institutions regarding capitalization for business purposes. Have students prepare lists of fixtures and equipment needed to furnish the business, complete with costs at current prices.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
	After reviewing the market research and promotional mix have students list a basic stock of inventory and cost it for capitalization purposes.	
5. prepare budgets to forecast financial activities:	Using the results of the survey or research, have students estimate the sales/revenue for one-, two-, and three-year periods. Assist the students in preparing pro forma statements of cash in-flows from all sources, as well as a form that would list the appropriate criteria for cash in-flows over a three-year period.	Refer to Appendix A: "(Sample) Cash In-Flow Pro Forma Statements; (Sample) Cash Out-Flow Pro Forma Statement."
a) prepare pro forma statement of cash in-flow from all sources;		
b) prepare pro forma statement of cash out-flow from all sources;	From estimates of costs have students develop and prepare a form to estimate the out-flows of cash. By referring to the accounts typical to the proposed business, have students prepare a three-year pro forma statement of cash out-flows.	
	Stress the importance of the pro forma cash flow statement in the planning for short-term credit (line of credit to be arranged with a bank/ credit union, etc). The money arising from this need is called "working capital".	
c) prepare a schedule of allowable depreciation of all assets for income tax purposes;	After students have determined the type of business to be researched, the nature of the clientele, the location for the proposed business, and the list of assets needed, ask them to prepare a schedule of allowable depreciation. Assist the students in preparing a form to reflect the status of book-value(s) for assets over a three-year period.	Refer to Appendix A, "(Sample) Depreciation Schedule."
	Discuss the need for the depreciation schedule to provide the current book values of assets; the tax deductible expense for depreciation; and the record of possible capital gain should assets be sold or replaced.	

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
d) prepare pro forma income statements for years one, two, and three;	From the estimates of revenues and costs, have students prepare pro forma income statements for years 1, 2, and 3. The data to support all components of the income statement should be based upon survey data, cash-flow schedules, depreciation schedules, and the review of literature pertinent to the industry. Discuss with students the need for pro forma income statements in estimating earnings. This will provide the information regarding capacity to repay financial backers, creditors, and other investors as well as working capital.	Refer to Appendix A, "(Sample) Pro Forma Income Statement."
e) prepare pro forma balance sheets for years one, two, and three;	Have students prepare pro forma balance sheets for years one, two, and three. Using the estimates of asset values, sales and profits, capitalization and cash-flows, have students prepare balance sheets for the year-end dates over the three-year period. Discuss with students how the pro forma balance sheets will provide information regarding the growth of the business, the value of the business, and the status of investors', creditors', and owners' share.	Refer to Appendix A, "Sample Pro Forma Balance Sheet."
6. prepare a set of accounting records:	Have students prepare a flowchart of the use of forms and/or the flow of data between the various accounts used by the business. Assist students in preparing an Accounting Policy Manual suited to the business, to document the procedures for using the various forms. The manual should include forms; criteria for systems and flowcharts to illustrate systems; accounting procedures; banking procedures; sales tax accounting; budgets and use of capital; reporting; and income statements and balance sheets.	Refer to the Handbook of Forms for examples of the usual forms, ledgers and journals used in a business. FORMS NORMALLY USED IN A MERCHANDISE BUSINESS - Cash register control forms - Daily reconciliation forms - Monthly sales ledger - Stock book control forms

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
		- Inventory sheets - Depreciation of merchandise form - Depreciation of assets form - Cheque register - Voucher register - Order forms for merchandise - Order forms for supplies - Monthly purchases ledger - Income statement forms - Balance sheet forms - Budgets
a) develop a letterhead with name and logo;	Have students prepare alternative designs (logos) to symbolize the business in some meaningful way. Select the most suitable alternative that supports the desired image, the name, and the intended use of the logo (letterhead, store sign, etc.).	
b) develop flowcharts for systems of merchandise control, financial control(sales), financial control (banking), and personnel review of staff and training;	Have students prepare flowcharts to show the relationships between the components of various systems: merchandise; finance/ accounting; banking; and the review of personnel.	
c) graph projected sales, purchases, profits, depreciation, expenses, and cash flows over a three-year period;	By making reference to pro forma statements, depreciation schedules, and expected cash-flows, have students prepare graphs to illustrate the trends over the three-year projection.	Refer to Appendix B, "Sample Bar-Graph," "Sample Line-Graph."
d) diagram break-even analyses for years one, two, and three;	From data on the pro forma income statement, have students prepare three break-even analyses, one for each year's projected business. Have the students review and discuss the points at which the business would break even, etc.	Refer to Appendix B, "Break-Even Analysis."

GOALS AND OBJECTIVES	TEACHERS' NOTES AND SUGGESTED ACTIVITIES	SUGGESTED MATERIALS
7. prepare an administrative policy manual; 8. prepare a comprehensive report on the proposed business.	Have students prepare an Administrative Policy Manual to provide guidance for issues of routine business. Students should consider the issues that are of concern to customers, as well as those of concern to staff. Particular emphasis should be placed upon a review of job descriptions, staff evaluation criteria, and staff training proposals. Have students prepare and present to critics their seminar feasibility study. This necessitates the compiling of this option's efforts into one comprehensive report. Help students to organize the sections of their report by topics.	SAMPLE TOPICS FOR AN ADMINISTRATIVE/PERSONNEL MANUAL - Purpose of the business - Ethical issues in staff and business conduct - Returns, delivery, and credit policies - Job descriptions for staff - Evaluation criteria for staff SAMPLE SECTIONS AND REPORT TOPICS 1. Cover, title page 2. Table of contents 3. Market research 4. Promotional mix 5. Procurements 6. Cash-flows 7. Depreciation 8. Income statements and balance sheets 9. Accounting system 10. Logo 11. Graphing and analysis 12. Manuals for accounting, merchandising and personnel policies

CORRELATION OF COURSE CONTENT WITH SUPPORT MATERIALS

	APPROVED TEXTBOOKS			OTHER REFERENCES
COURSE CONTENT	Willings, D. Understanding Management	Knudson et al. Management: An Experiential Approach	Gillespie et al. Retail Business Management	
I. PLANNING GOALS				
A. Target Market	Chapters 3-8, 21 and 22	Part III	Parts 3, 5, 7, 9, and 10	Management and Organization, Sisk and Williams, Chapters 4-5
B. Finance	Chapters 3-8, 21 and 22	Part III	Parts 3, 5, 7, 9, and 10	
C. Merchandise	Chapters 3-8, 21 and 22	Part III	Parts 3, 5, 7, 9, and 10	
D. Administration	Chapters 3-8, 21 and 22	Part III	Parts 3, 5, 7, 9, and 10	
II. ORGANIZING GOALS				
A. Finance	Chapter 17	Part IV	Parts 3, 5, 7, 9, and 10	Sisk and Williams, Chapters 8-12
B. Merchandise	Chapter 17	Part IV	Parts 3, 5, 7, 9, and 10	
C. Administration	Chapter 17	Part IV	Parts 3, 5, 7, 9, and 10	
III. DIRECTING GOALS				
A. Finance	Chapters 3-8	Parts I, II, V, and VI	Parts 3, 5, 7, 9, and 10	Sisk and Williams, Chapters 8-12
B. Merchandise	Chapters 3-8	Parts I, II, V, and VI	Parts 3, 5, 7, 9, and 10	
C. Administration	Chapters 3-8	Parts I, II, V, and VI	Parts 3, 5, 7, 9, and 10	
IV. CONTROLLING GOALS				
A. Finance	Chapters 3-8, 17, 18, and 21	Part IV, VI, and VII	Parts 3, 5, 7, 9 and 10	Sisk and Williams, Chapters 19-21
B. Merchandise	Chapters 3-8, 17, 18, and 21	Part IV, VI, and VII	Parts 3, 5, 7, 9, and 10	
C. Administration	Chapters 3-8, 17, 18, and 21	Part IV, VI, and VII	Parts 3, 5, 7, 9, and 10	
V. GENERAL GOALS				
A. Management in Practice	Chapters 21 and 22	Parts I, II, III, IV, VII and IX	Parts 1, 2, 4, and 6	

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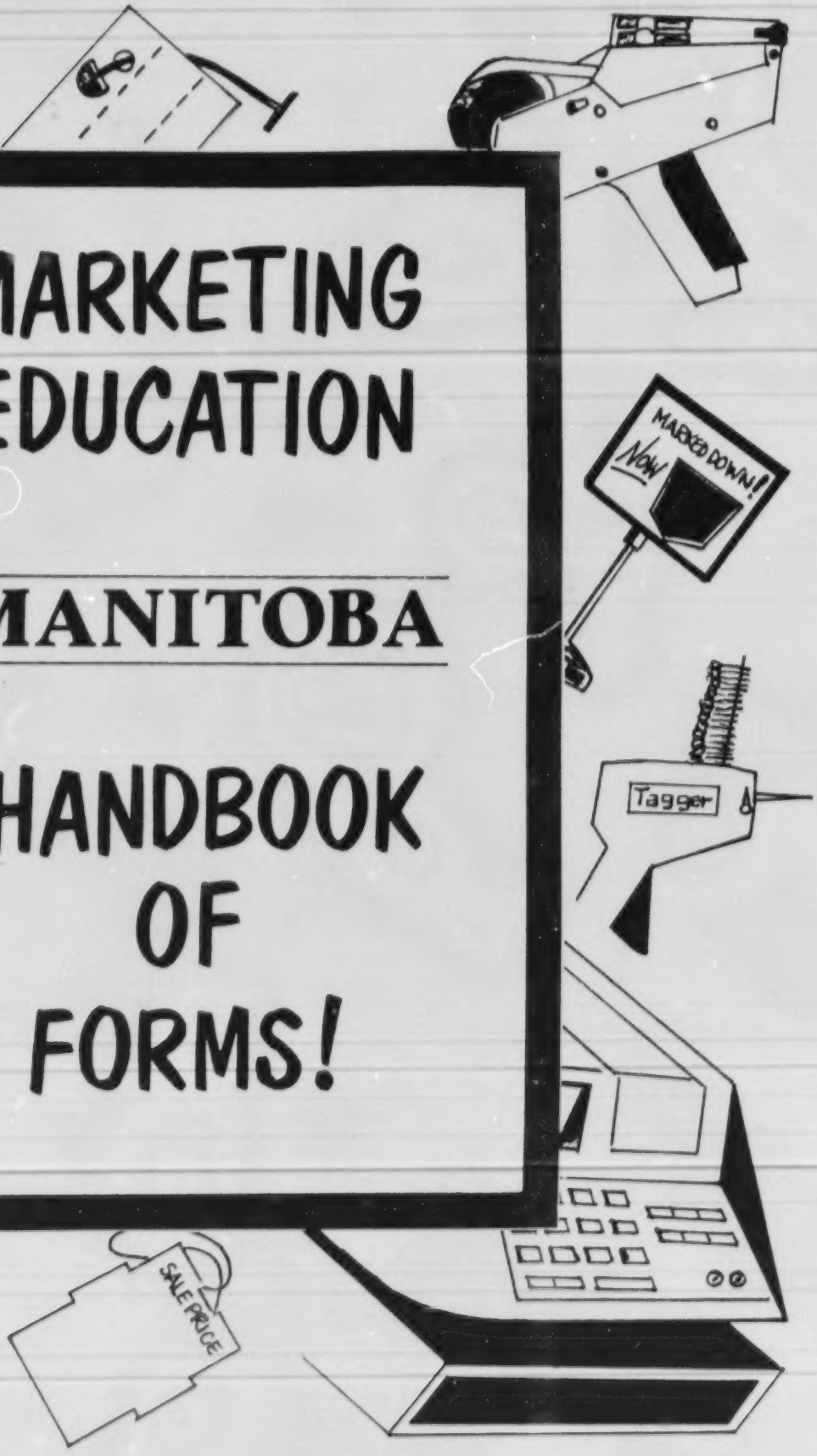
Memo. Pitman Publishing, 517 Wellington Street West, Toronto, Ontario, M5V 1G1.

MARKETING EDUCATION

MANITOBA

HANDBOOK OF FORMS!



ACKNOWLEDGEMENTS

The Marketing Education Handbook of Forms was prepared for use in the Marketing programs offered in Manitoba schools. The forms were prepared by H. Marshall Draper; the booklet was compiled by B. Ulrich in conjunction with the advic of the Marketing Curriculum Committee

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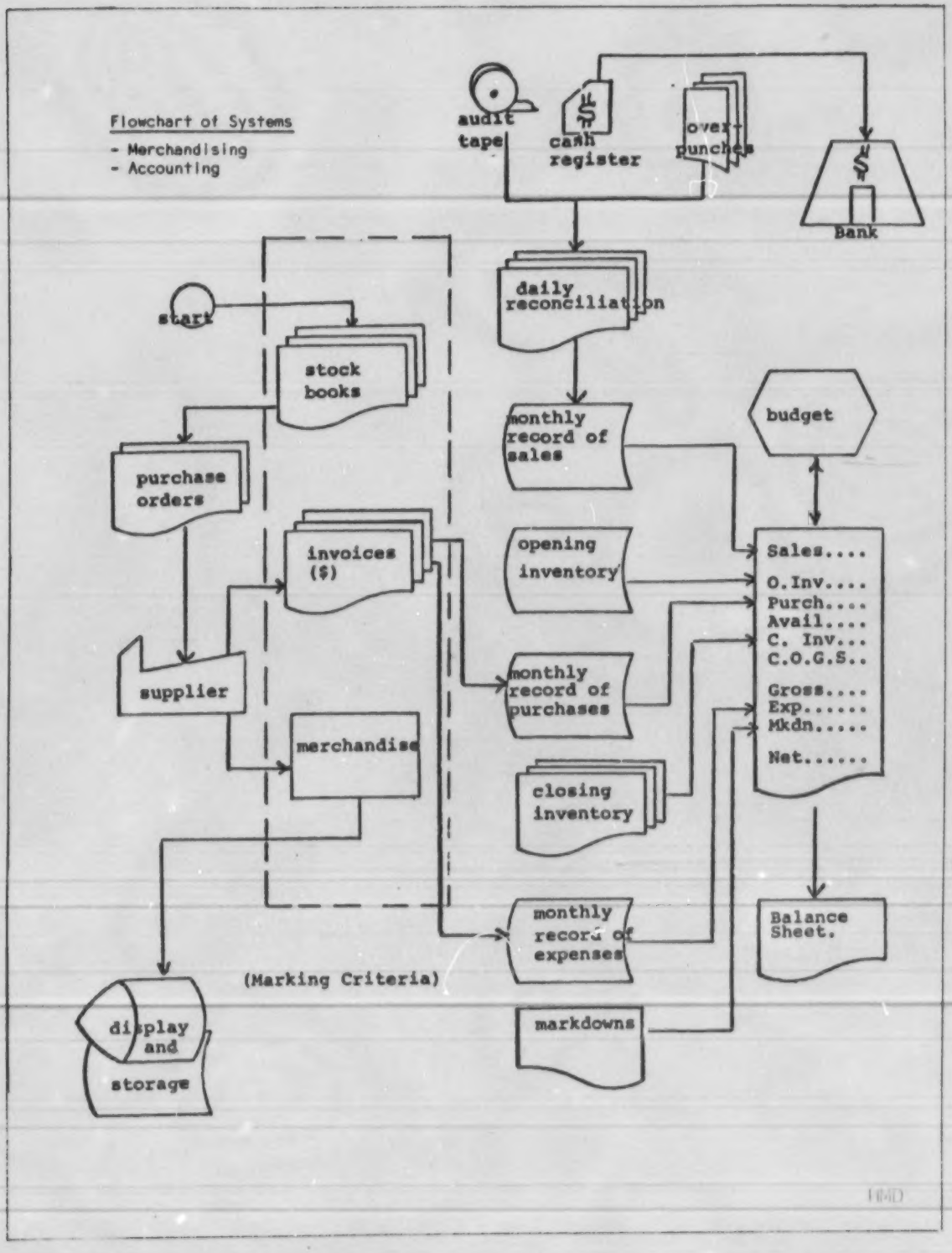

Flowchart of Systems
- Merchandising
- Accounting
audit tape
cash register
over-punches
Bank
daily reconciliation
start
stock books
budget
monthly record of sales
purchase orders
invoices ($)
opening inventory
Sales....
O.Inv....
Purch....
Avail....
C. Inv...
C.O.G.S..
Gross....
Exp.....
Mkdn.....
Net.....
supplier
monthly record of purchases
merchandise
closing inventory
monthly record of expenses
Balance Sheet.
(Marking Criteria)
display and storage
markdowns

Department _____ Stock Book Page ____

Stock No.	Cost-land	Retail	Description	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	No. sold this year
			reg ____											
			reg ____											
			reg ____											
			reg ____											
			reg ____											
			reg ____											
			reg ____											
			reg ____											
			reg ____											
			reg ____											

HMD

Logo goes here

Store Name _____

Month... _____

Department _____

Proforma Order Form

Description of item	Our Stock #	Quantity Needed	Supplier's Name and Address

_____
stock check taken by

_____
orders written by

_____
checked by teacher

HMD

Store Name: _____

Date: _____

logo goes here

Proforma Invoice

This form is to be used when there is no invoice on hand when the merchandise is to be marked and sold. The merchandise is to be listed, assigned stock numbers, and the cost-landed value is to be estimated. From the estimated cost, a retail may be set, and the merchandise marked. When the invoice arrives, it should be compared to this proforma since the merchandise is no longer on hand for the comparison.

Supplier: _____

_____

_____

Description of Item	Our Stock #	Quantity Received	Estimated Cost Landed at the Store	
			Unit Cost	Total

Total value of invoice _____

PREPARED BY: _____

(MD)

Store Name _____

logo goes here

Month _____

Monthly Record of Purchases and Cheques

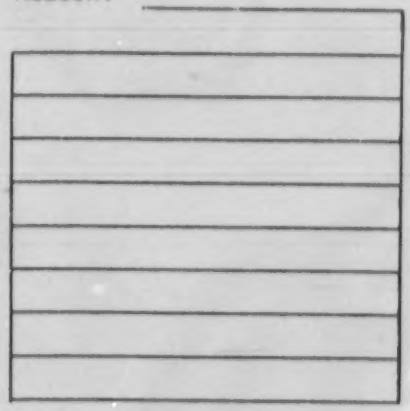
Supplier	Date	Department 1	2	3	4	Total	Cheque Number

Overpunch Form

Date _____

Amount $ _____

Reason: _____



Customer
signature _____

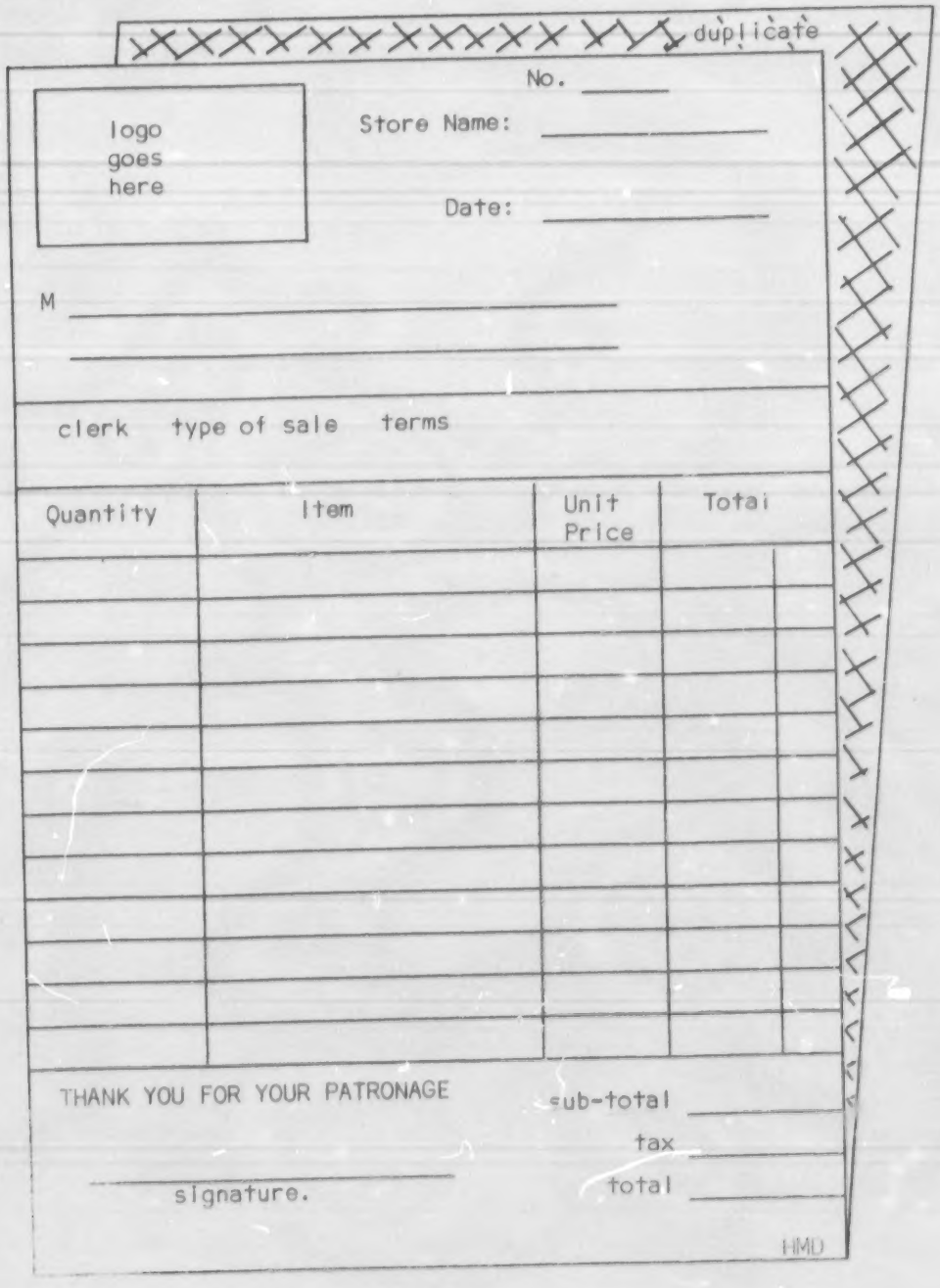
_____

Salesperson
or cashier _____

Supervisor _____

HMD

Counterslip



Tally Card

fwd	fwd
1	16
2	17
3	18
4	19
5	20
6	21
7	22
8	23
9	24
10	25
11	26
12	27
13	28
14	29
15	30
total	total

HMD

logo goes here

Store Name.... _____

Date..... _____

Daily Reconciliation

Cash count

___ x	$20.00	
___ x	10.00	
___ x	5.00	
___ x	2.00	
___ x	1.00	
___ x	.25	
___ x	.10	
___ x	.05	
___ x	.01	
cheques		
Total Cash		

Cash Balance

Sales	
Tax	
Total Cash	

Cash Register Balance

Total Cash	
Adjusted Tape	
Over/Short	

Sales Reconciliation (Cash Register Adjustments)

Register Reading	Overpunches	Adjusted Tape Total

Sales Split (by Departments)

				Tax	Total
1.	2.	3.	4.		

Student _____

Supervisor _____

Teacher _____

(signatures)

HMD

Store Name _____

Month _____, _____

Monthly Record of Sales

Date	Total Cash	Tax	Total Sales	1	2	3	4
Total							
Previous							
To Date							

HMD

Store Name _____

logo goes here

Date _____

Page No. _____

Inventory Sheet

Description	Age Code	Dept. Code	Stock No.	Code Cost	De-Code	Quantity	Extension	Retail

Store Name _____

logo goes here

Monthly Record of Depreciation

Item	Qty Offered	Qty Left	#1 Qty Sold	× #2 Unit Cost Change	New Cost	= Old Cost	#3 Total Loss @ Cost	Old Retail	New Retail

Total Depreciation =

Forward Total =

Total to Date +

Name(s) of Sales Events Requiring Markdowns

1. _____
2. _____
3. _____
4. _____

_____ Manager.

HMD

Store Name _____

Month _____, _____

Monthly Record of Expenses

Date	Description of Expense	Total

Month Total	
Previous Total	
Total to Date	

logo
goes
here

_____
Manager

HMD

Store Name _____

Period ended... (Month) _____, ____

_____ Income Statement _____

SALES

Department 1 . . . . . $

2 . . . . . .

3 . . . . . .

4 . . . . . _____ $ [ ]

COST OF GOODS SOLD

Opening Inventory

Department 1 . . . . . $

2 . . . . . .

3 . . . . . .

4 . . . . . _____ $ [ ]

Purchases

Department 1 . . . . . $

2 . . . . . .

3 . . . . . .

4 . . . . . _____ $ [ ]

Cost of Goods Available for Sale . . . . $ [ ]

Closing Inventory

Department 1 . . . . . $

2 . . . . . .

3 . . . . . .

4 . . . . . _____ $ [ ]

Cost of Goods Sold $ [ ]

GROSS PROFIT PRIOR EXPENSES (_____ %) . . . . . $ [ ]

Less: Operating Expenses

Wages . . . . . $

Promotions . . . . . .

Other . . . . . .

Total Expenses . . . . . $ [ ]

NET PROFIT PRIOR MARKDOWNS . . . . . $ [ ]

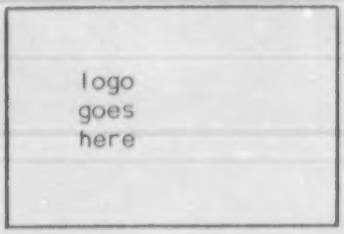
Markdowns (Add) . . . . . $ _____

NET PROFIT TO DATE . . . . . $ [ ]

_____

Manager

HMD



Store Name _____

BALANCE SHEET

as at _____

Assets:

Cash	$	_____
Current Account		_____
Savings Account		_____
Accounts Receivable		_____
Inventory		_____
Miscellaneous		_____
Total Assets	$	_____

Liabilities:

Loans	$	_____
Accounts Payable		_____
Miscellaneous		_____
Total Liabilities	$	_____

Equity:

Equity Account	$	_____
Total Equity	$	_____

Total Liabilities plus Owner's Equity $ _____

_____
teacher/manager

HMD

logo goes here

Store Name: _____

Budget

Year: _____

SALES

Month	Expected	Actual	Last Year
September			
October			
November			
December			
January			
February			
March			
April			
May			
June			
Total Sales			

EXPENSES

NET PROFIT

Month	Expected	Actual	Last Yr.	Expected	Actual	Last Yr.
Sept.						
Oct.						
Nov.						
Dec.						
Jan.						
Feb.						
Mar.						
Apr.						
May						
June						

HMD

(SAMPLE) PROFORMA INCOME STATEMENT

Revenues:	Year 1	Year 2	Year 3	
Sales				
Other				
Total				
Cost of Goods Sold:				
Open Inventory				
Purchases				
Cost of Goods Available				
Closing Inventory				
Cost of Goods Sold				
Gross Profit after Markdowns				
Markdowns				
Gross Profit prior Markdowns				
Expenses:				
Mortgage/Rent				
Wages				
Utilities				
Misc. (Depreciation)				
Total Expenses				
Net Profit prior Tax				
Taxes Payable				
Net Profit after Tax	$	$	$	
				HMD

(SAMPLE) PROFORMA BALANCE SHEETS

Assets:	Year 1	Year 2	Year 3	
Cash				
Accounts Receivable				
Inventory				
Fixtures & Equipment				
Building				
Land				
Other				
Total Assets	$	$	$	
Liabilities:				
Accounts Payable				
Notes Payable				
Loans				
Mortgages				
Other				
Total Liabilities	$	$	$	
Equity				
Owner's Equity	$	$	$	
Total Liability &				
Owner's Equity	$	$	$	
				HMD

(SAMPLE) CASH IN-FLOW PROFORMA STATEMENT

CASH IN-FLOW

	Year 1	Year 2	Year 3
SALES:	$	$	$
Accounts Receivable Collected:			
Fees For Services:			
Interest Earned:			
Other:			
- sales tax			
- discounts			
- etc.			
Total Cash-In	$	$	$

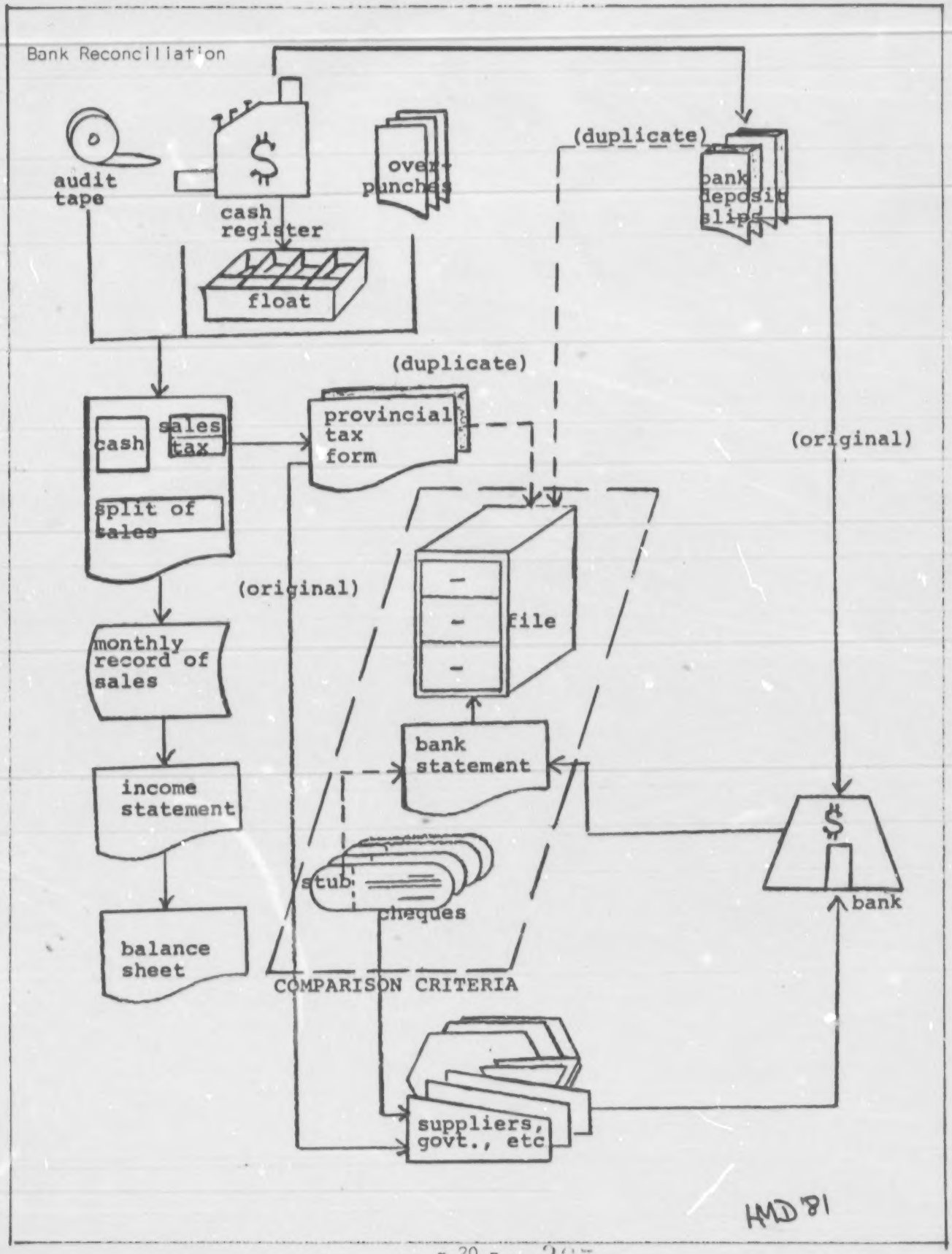
HMD

(SAMPLE) CASH OUT-FLOW PROFORMA STATEMENT

CASH OUT-FLOW

	Year 1	Year 2	Year 3
Purchases (Accounts)	$	$	$
Payable:			
Wages:			
Fees Owed:			
Drawings:			
Interest Owed:			
Mortgage/Rent:			
Utilities:			
Heat			
Water			
Electricity			
Misc.			
Other Expenses			
Total Cash-Out	$	$	$

HMD


Bank Reconciliation
audit tape
cash register
over-punches
(duplicate)
bank deposit slips
float
(duplicate)
provincial tax form
(original)
cash
sales tax
split of sales
(original)
file
monthly record of sales
bank statement
income statement
stub
cheques
bank
balance sheet
COMPARISON CRITERIA
suppliers, govt., etc
HMD 81

(SAMPLE) DEPRECIATION SCHEDULE						
Asset	Original Value	Deprec. Rate	Deprec. $	Depreciated Value Year 1	Year 2	Year 3
Building:	$100,000	10%	$10,000	$90,000	$80,000	$70,000
Fixtures:	24,000	20%	4,800	19,200	14,400	9,600
Equipment:						
delivery van						
cash register						
misc.						
Other:						
Total:	$		$	$	$	$
			(Tax Deductible)			
						HMD

SAMPLE PROMOTIONAL TIMELINE				
Date	Lead-Time	Event	Merchandise or Service	Themes Color, Slogan, etc.
Sept. 1-15	last week June	back to school	school supplies	warm colors "Back to School"
Oct. 7-14 14-31	Sept. 15-30 Oct. 7-14	Fall fashion Halloween	Jackets candy/records	browns, orange, etc. black, orange
	etc. ↓			
Christmas Dec. 1-24	Nov. 15-30	gift ideas nativity happy holiday	assorted gifts n/a clearance	red-green "Spirit of Christmas"
	etc. ↓			
	etc. ↓			
April 15-30	April 7-15	Spring Fashions	jeans T shirts	showers, pastel colors
	etc. ↓			
	etc. ↓			
Prepare "Back-to-School" promotions for use in September. HMD				

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9. Comparison Shopping Report Form
10. Turnover Ratio
11. Break-Even Analysis
12. Script Form
13. Table Showing Effect of Coloured Lights on Various Colours
14. Display Evaluation Form
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16. Communication Model
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18. Wages-Costs Cycle
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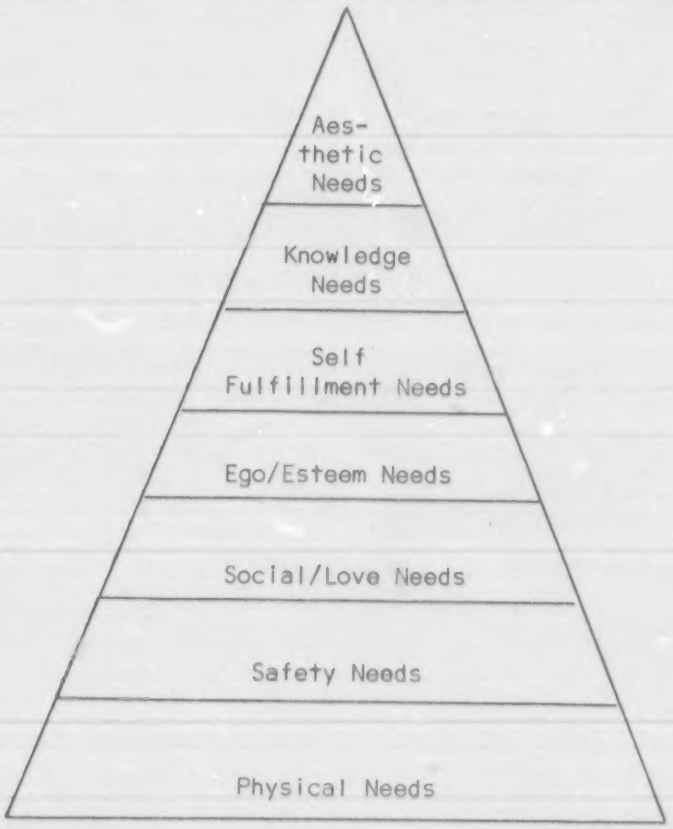
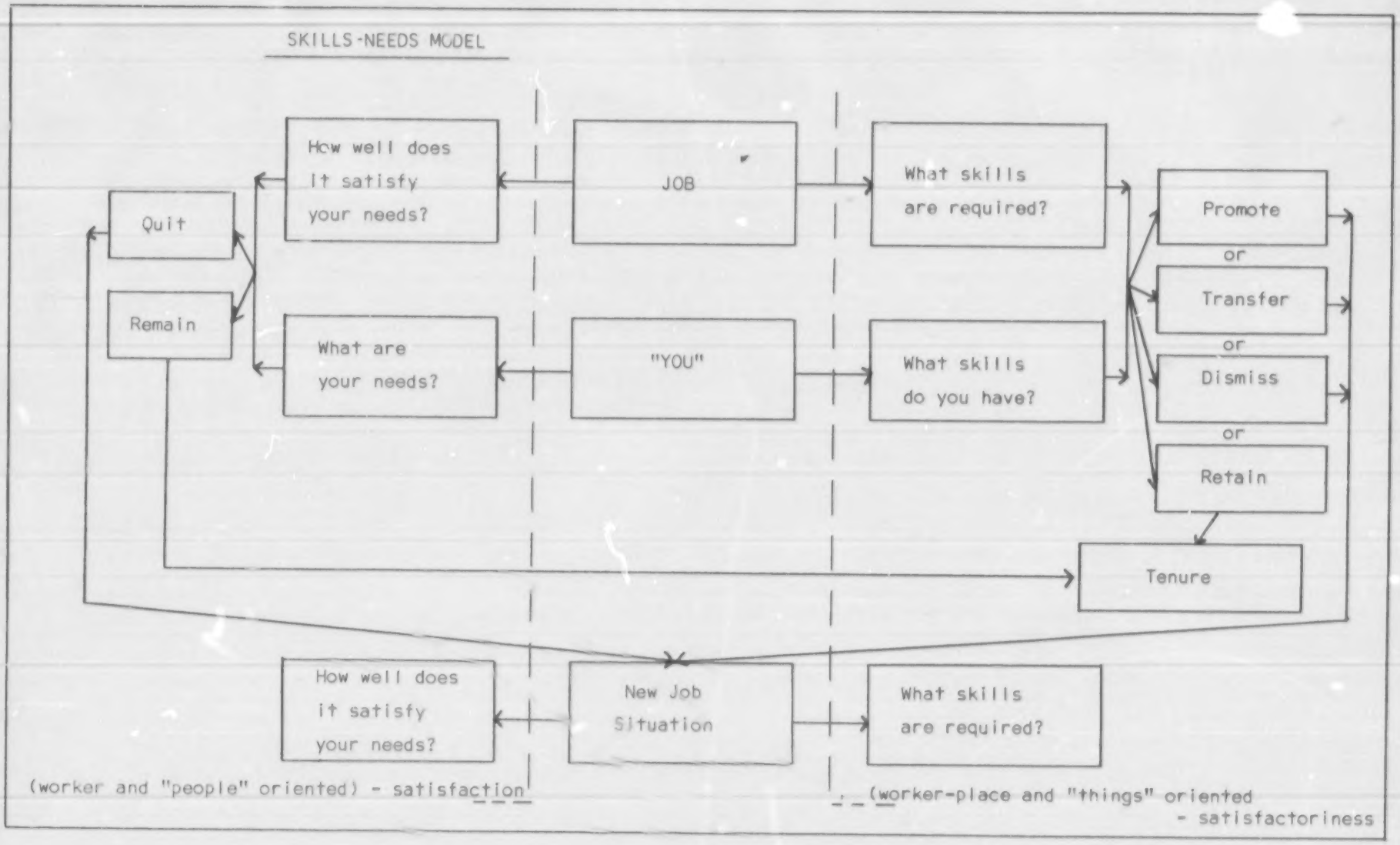
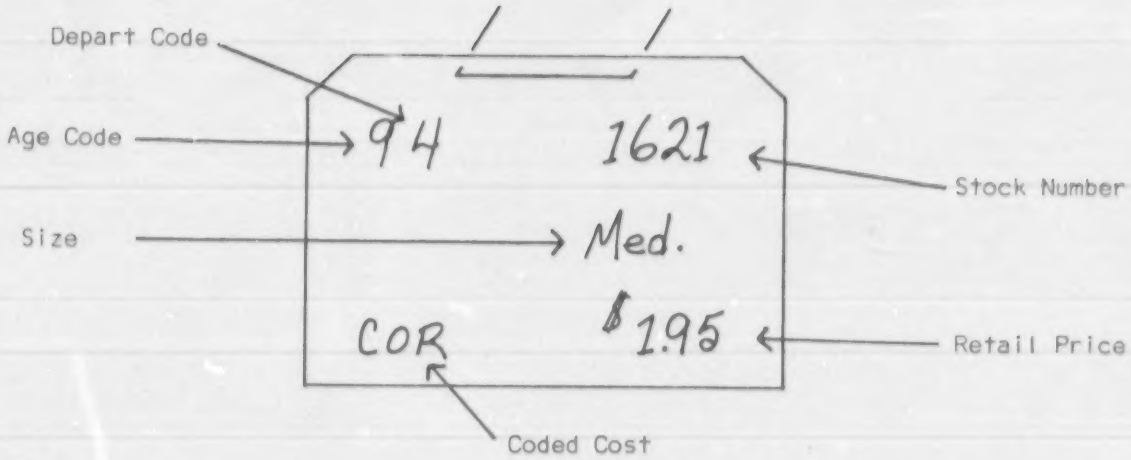
21. Line Organization
22. Staff Organization
23. Line and Staff Organization
24. Committee Organization
25. Motive-Drive Force
26. Sample Bar Graph; Sample Line Graph
27. Profit Meter

MASLOW'S HIERARCHY OF NEEDS

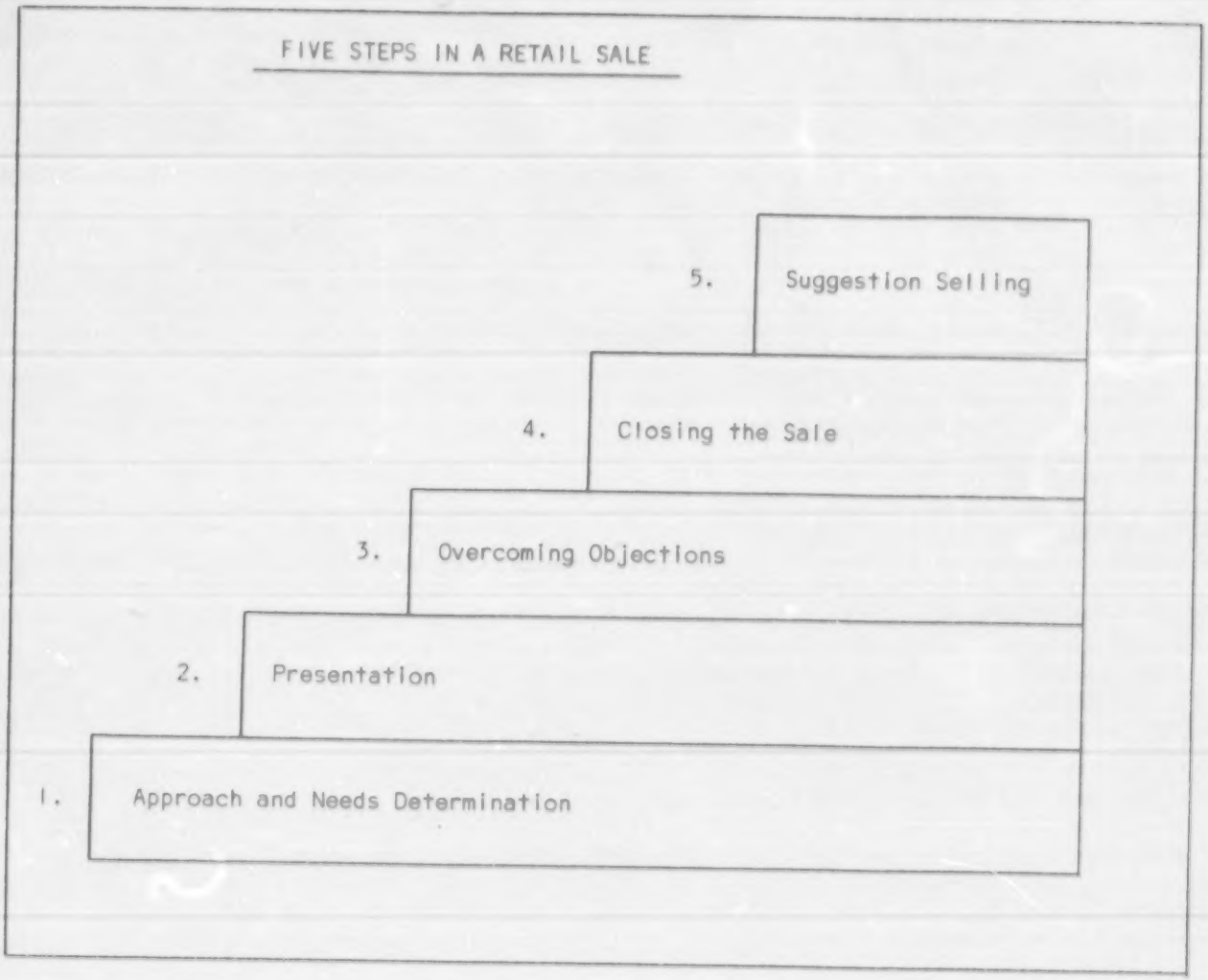



SKILLS-NEEDS MODEL
How well does it satisfy your needs?
JOB
What skills are required?
Quit
Remain
What are your needs?
"YOU"
What skills do you have?
Promote
or
Transfer
or
Dismiss
or
Retain
Tenure
How well does it satisfy your needs?
New Job Situation
What skills are required?
(worker and "people" oriented) - satisfaction
(worker-place and "things" oriented - satisfactoriness

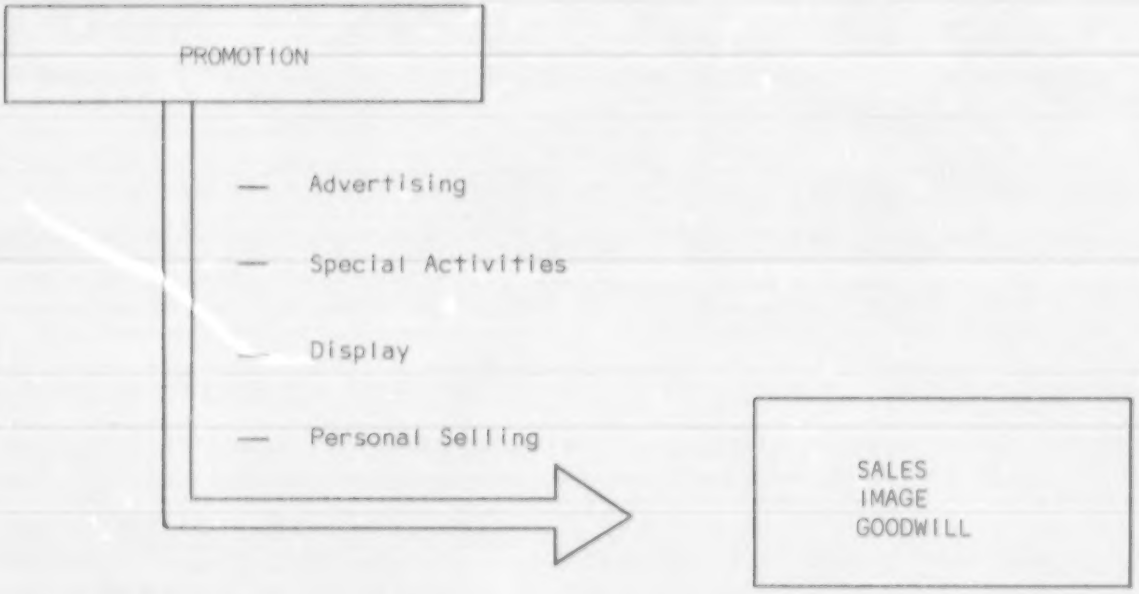
SAMPLE TICKET



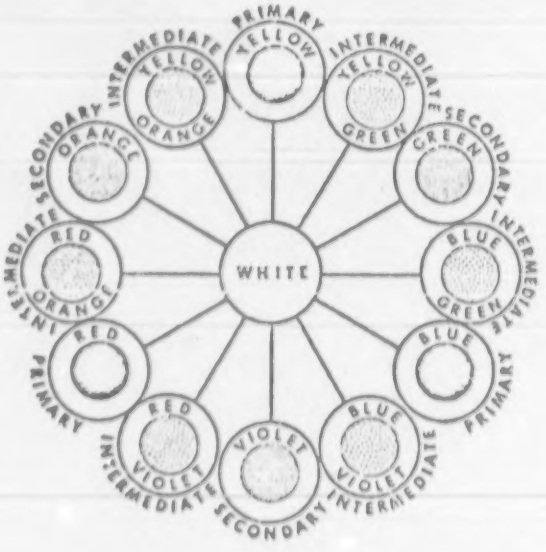
FIVE STEPS IN A RETAIL SALE



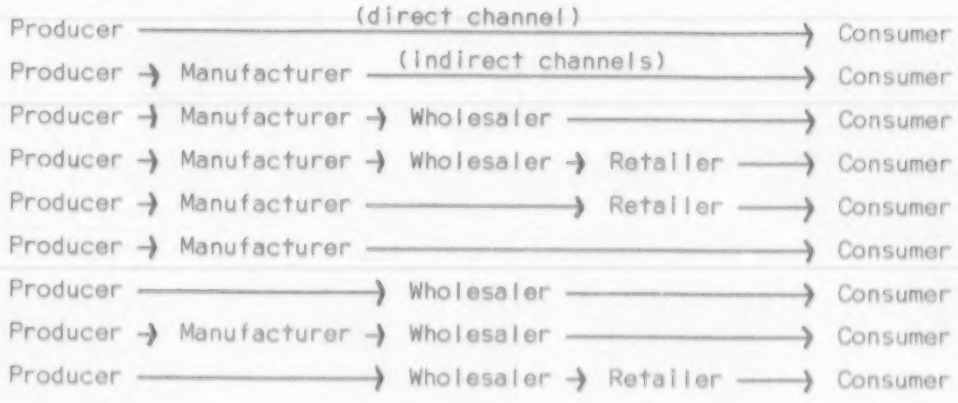
PROMOTION COMPONENTS



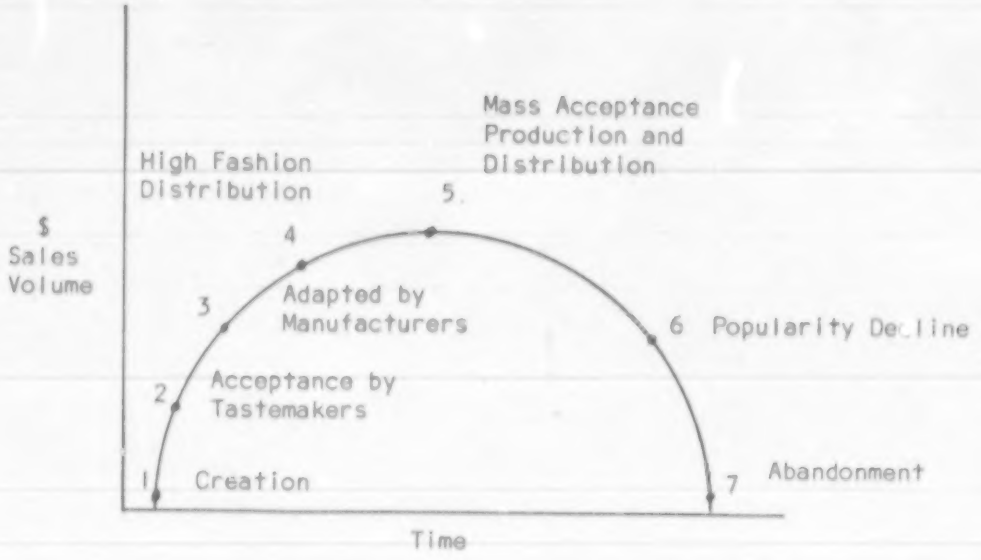
COLOUR WHEEL

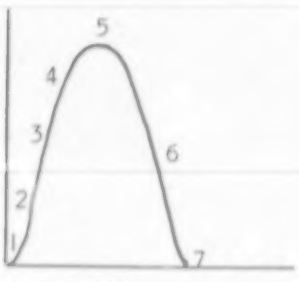


DISTRIBUTION CHANNELS

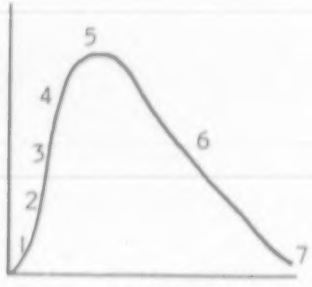

(direct channel)
Producer → Consumer
(indirect channels)
Producer → Manufacturer → Consumer
Producer → Manufacturer → Wholesaler → Consumer
Producer → Manufacturer → Wholesaler → Retailer → Consumer
Producer → Manufacturer → Retailer → Consumer
Producer → Manufacturer → Consumer
Producer → Wholesaler → Consumer
Producer → Manufacturer → Wholesaler → Consumer
Producer → Wholesaler → Retailer → Consumer

FASHION CYCLE(S)

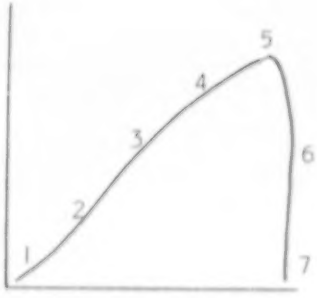




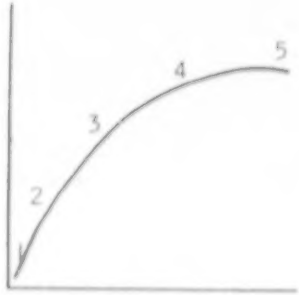
e.g., "Disco"



e.g., "Mini Skirts"



e.g., "Maxi Skirts"



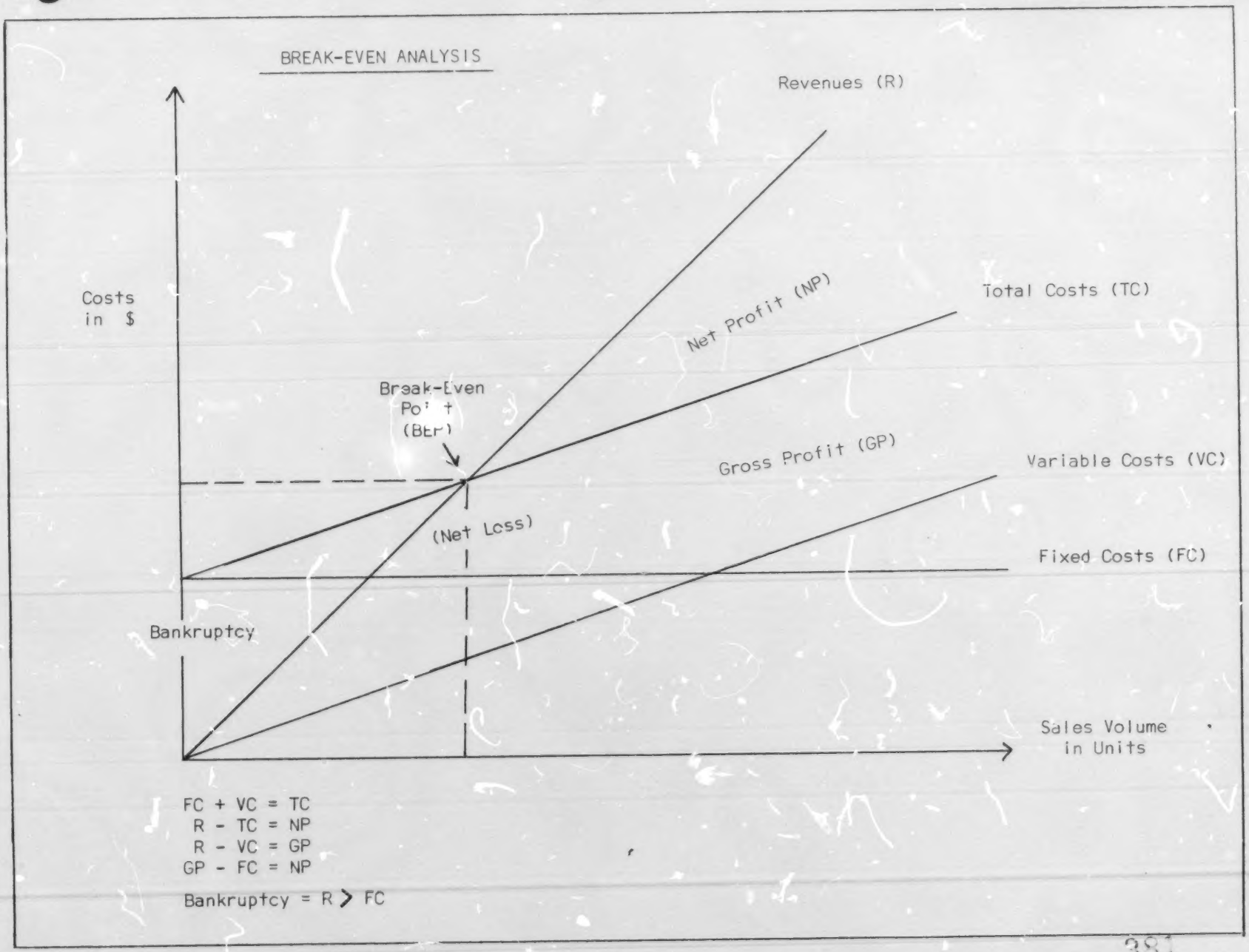
e.g., "Classic Cars"

COMPARISON SHOPPING REPORT FORM

Item	Brand	Prices		
		Store 1	Store 2	Store 3
Totals				

TURNOVER RATIO:

$$= \frac{\text{sales per period (\$)}}{\text{average inventory (\$)}}$$


BREAK-EVEN ANALYSIS
Revenues (R)
Costs in $
Net Profit (NP)
Total Costs (TC)
Break-Even Point (BEP)
Gross Profit (GP)
Variable Costs (VC)
(Net Loss)
Fixed Costs (FC)
Bankruptcy
Sales Volume in Units
FC + VC = TC
R - TC = NP
R - VC = GP
GP - FC = NP
Bankruptcy = R > FC

SCRIPT FORM

T. V. Commercial ☐
Radio Commercial ☐

ACTION	DIALOGUE	TIME Min:Sec
e.g.:		
G walks to the table and picks up the sweater	- Nil -	00:10
M approaches G and uses merchandise approach	"Those sweaters have just arrived from Britain. They are priced at an introductory special."	00:05
	TOTAL	02:00

TABLE SHOWING EFFECT OF COLOURED LIGHTS ON VARIOUS COLOURS

Original Colour of Fabric	Colour of Light Falling on Fabrics					
	Red	Orange	Yellow	Green	Blue	Violet
Black	Purplish Black	Deep Maroon	Yellow Olive	Greenish Brown	Blue Black	Faint Violet
White	Red	Orange	Light Yellow	Green	Blue	Violet
Orange	Orange Red	Intense Orange	Yellow Orange	Faint Yellow Slightly Greenish	Brown Slightly Violet	Light Blue
Red	Intense Red	Scarlet	Orange	Brown	Violet	Red Purple Violet
Yellow	Orange	Yellow Orange	Orange Yellow	Yellowish Green	Green	Brown Tinged With Faint Red
Light Green	Reddish Gray	Yellow Green	Greenish Yellow	Intense Green	Blue Green	Light Purple
Deep Green	Reddish Black	Rusty Green	Yellowish Green	Intense Green	Greenish Blue	
Light Blue	Violet	Orange Gray	Yellowish Green	Green Blue	Vivid Blue	
Deep Blue		Gray Slightly on Orange	Green Slate	Blue Green	Intense Blue	Bright Blue Violet
Indigo Blue		Orange Maroon	Orange Yellow (very dull)	Dull Green	Dark Blue Indigo	Deep Blue Violet
Violet	Purple	Red Maroon	Yellow Maroon	Blue Greenish Brown	Deep Bluish Violet	Deep Violet

DISPLAY EVALUATION FORM

NAME: _____

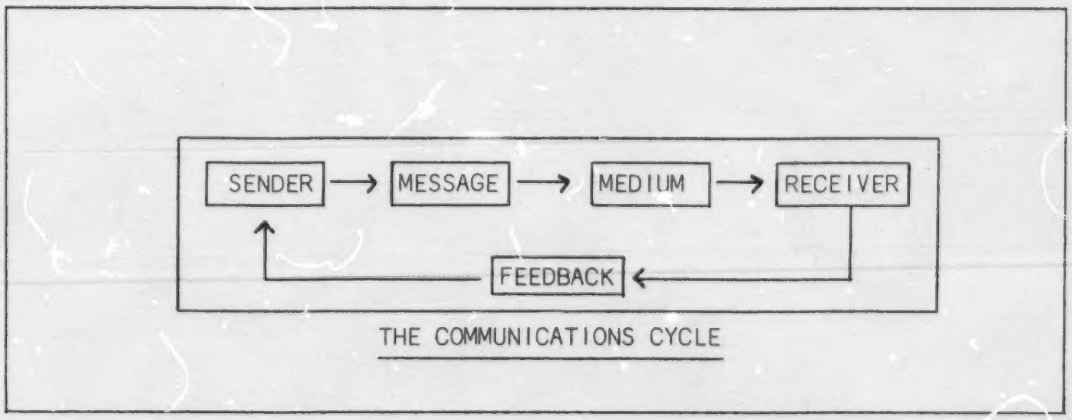
DATE: _____

DISPLAY AREA: _____

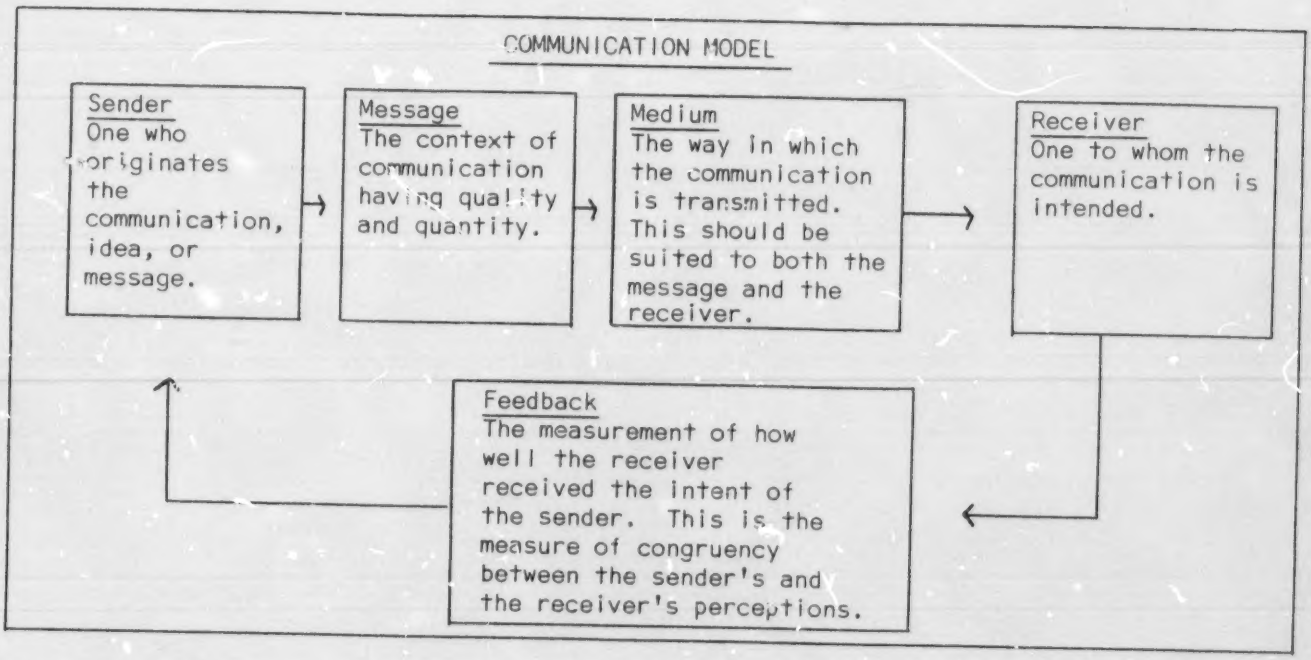
COMPONENTS Marks	(0-4)	(5-7)	(8-10)
1. Arrangements: How well and to what purpose does the display reflect the use of arrangements: repetition; pyramid; stair-step; radiation; or zig-zag?			
2. Lighting: To what extent are lights used to feature items best featured? Consider the effect of coloured lights.			
3. Cleanliness: Grade the cleanliness of walls, backgrounds, merchandise, props and glass.			
4. Selling Power: Does the display show uses of merchandise, novel ideas, or needs satisfaction?			
5. Timeliness: Is the display appropriate for the event, season, or use of merchandise?			
6. Use of Colour: Evaluate the display on the effective psychological use of colour, the apparent colour scheme(s) used, and the way in which props/merchandise are colour coordinated.			
7. Technical Features: What original features are used -- e.g., wire, mesh, string, wood, unusual props, etc.? Look for simplicity and imagination used in the design.			
8. Power to Attract Attention: Evaluate the effective use of bright colour, lighting, show-cards, lettering, movement, implied movement, novelty, and strong appeals.			
TOTALS			

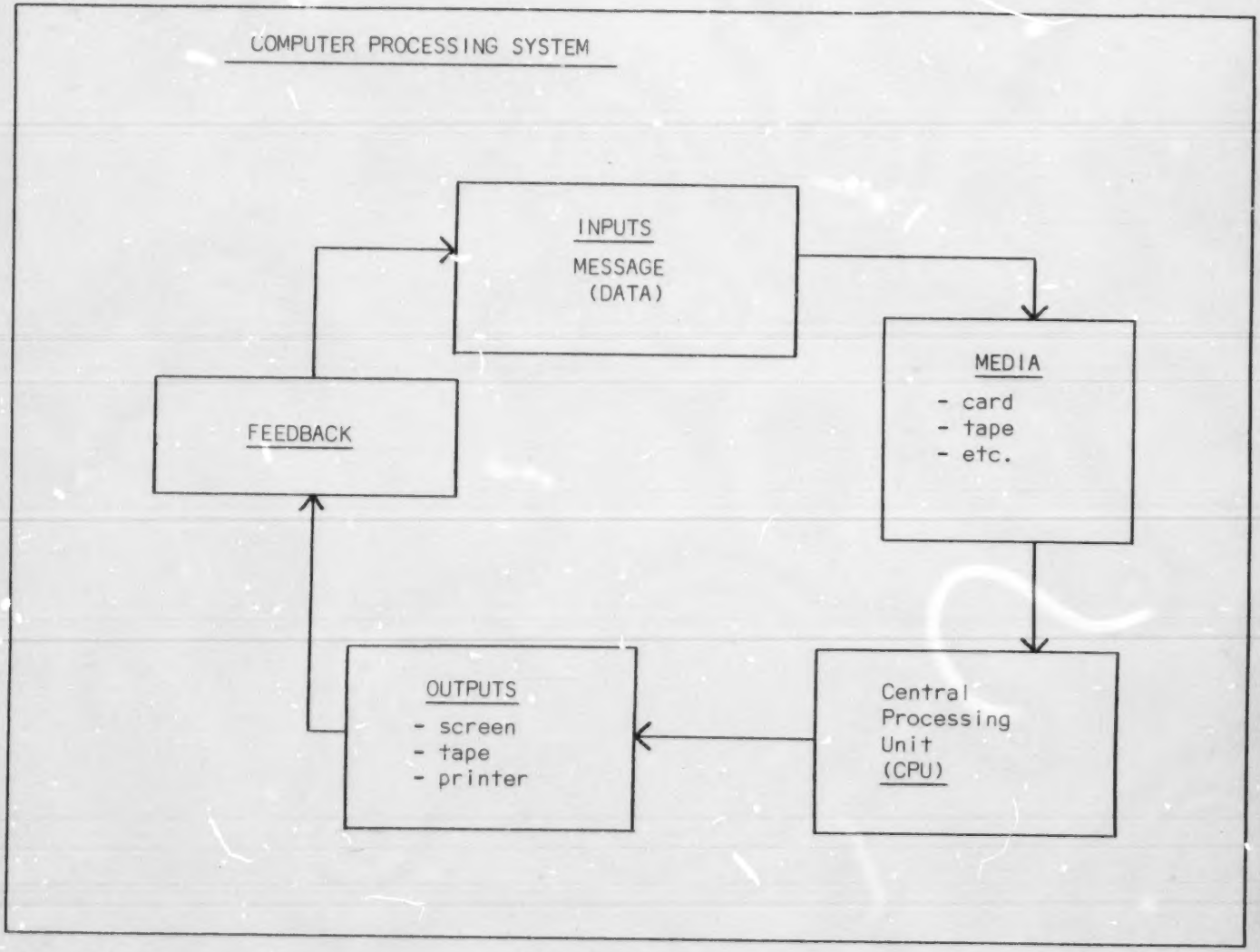
GRAND TOTAL _____ /80

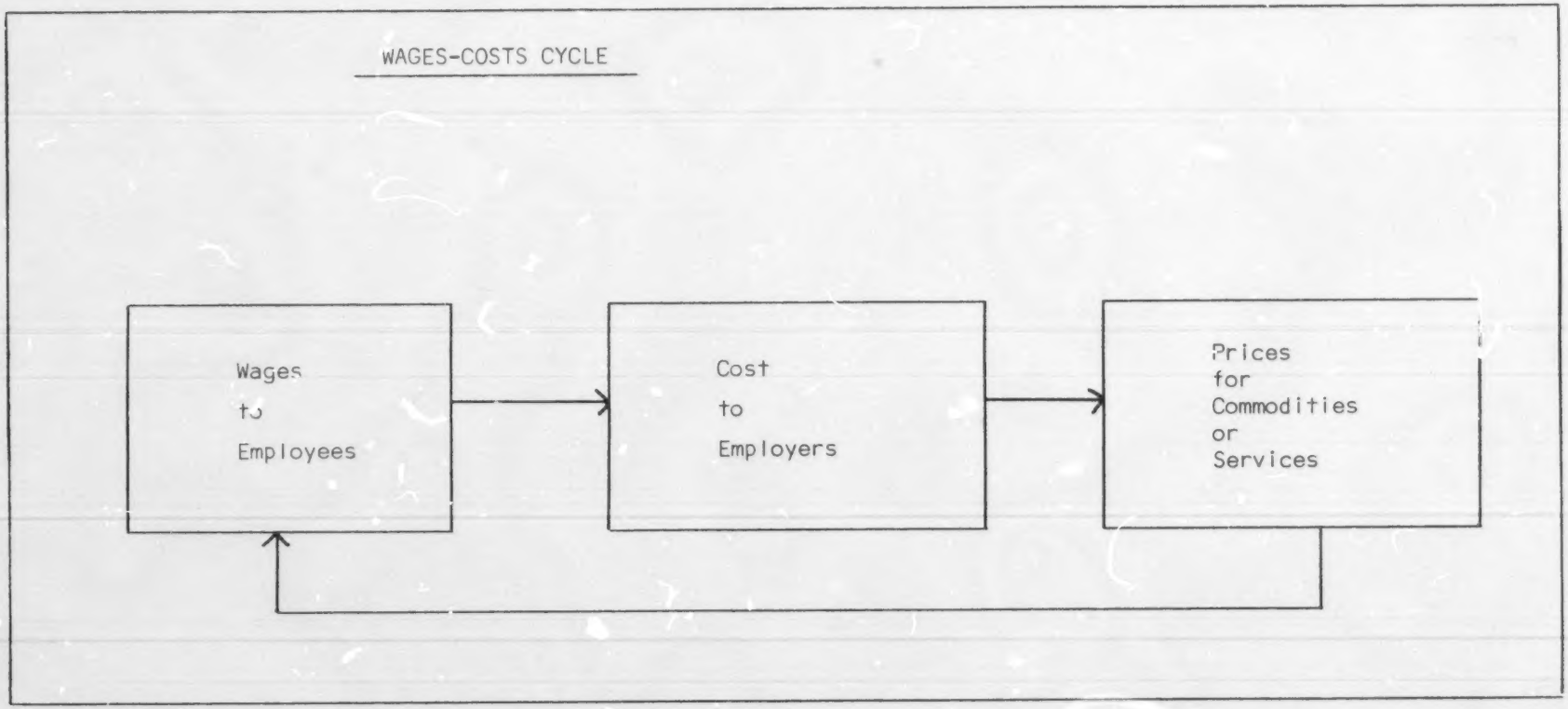
Display Designer/Builder(s) _____ Teacher/Evaluator _____



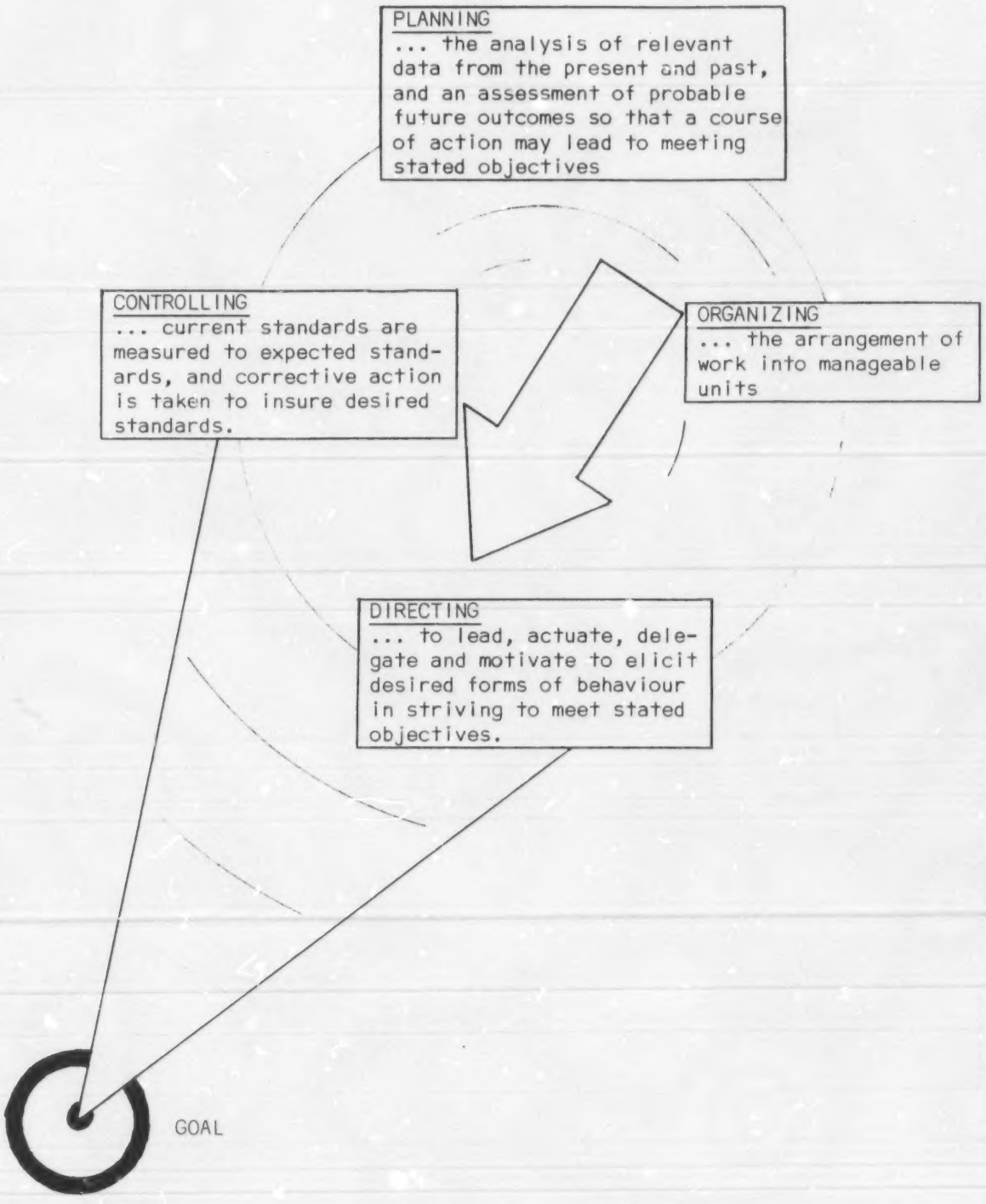
THE COMMUNICATIONS CYCLE


COMMUNICATION MODEL
Sender
One who originates the communication, idea, or message.
Message
The context of communication having quality and quantity.
Medium
The way in which the communication is transmitted. This should be suited to both the message and the receiver.
Receiver
One to whom the communication is intended.
Feedback
The measurement of how well the receiver received the intent of the sender. This is the measure of congruency between the sender's and the receiver's perceptions.


COMPUTER PROCESSING SYSTEM
INPUTS
MESSAGE
(DATA)
MEDIA
- card
- tape
- etc.
FEEDBACK
OUTPUTS
- screen
- tape
- printer
Central
Processing
Unit
(CPU)


WAGES-COSTS CYCLE
Wages to Employees
Cost to Employers
Prices for Commodities or Services

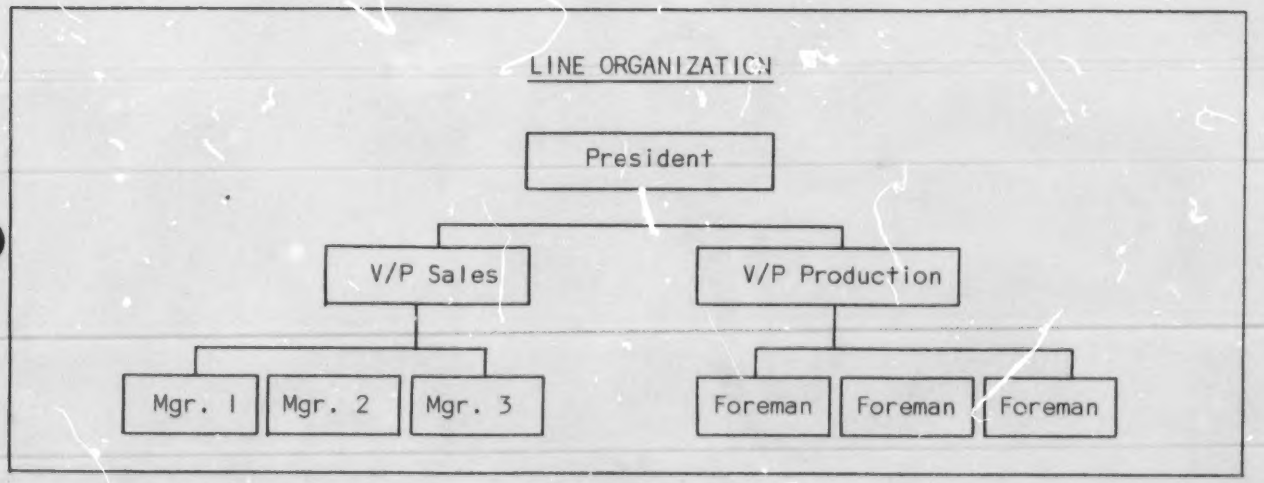
THE MANAGEMENT CYCLE


PLANNING
... the analysis of relevant data from the present and past, and an assessment of probable future outcomes so that a course of action may lead to meeting stated objectives
ORGANIZING
... the arrangement of work into manageable units
DIRECTING
... to lead, actuate, delegate and motivate to elicit desired forms of behaviour in striving to meet stated objectives.
CONTROLLING
... current standards are measured to expected standards, and corrective action is taken to insure desired standards.
GOAL

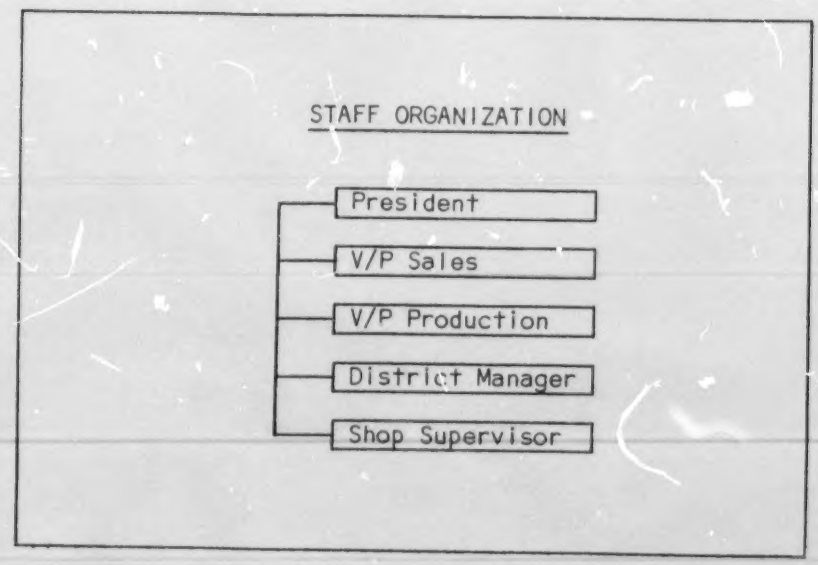
INCOME STATEMENT

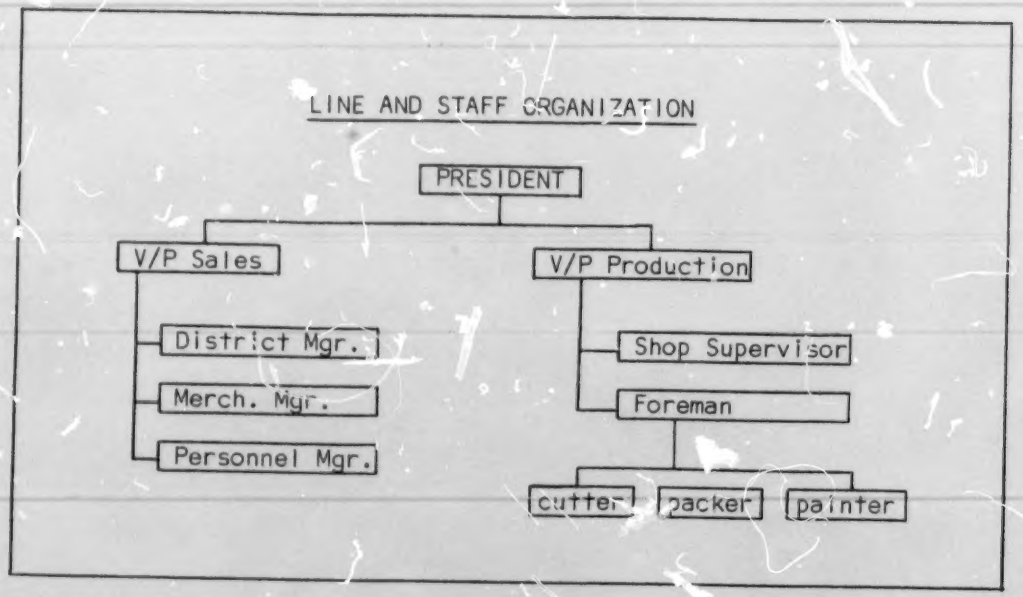
For the period ended _____

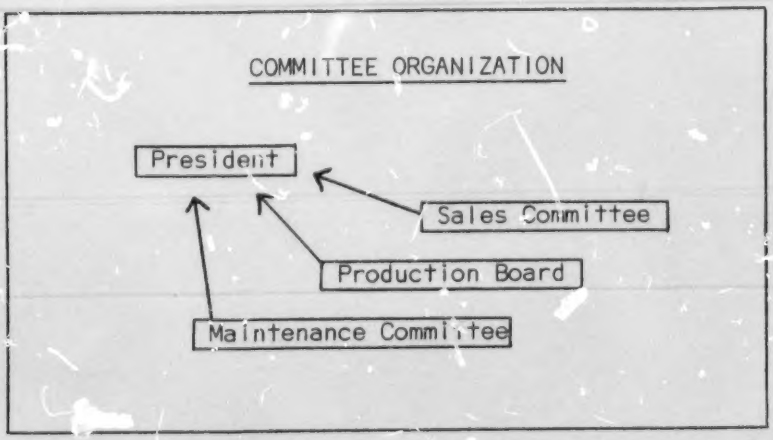
Sales		$100 000.00
Cost of Goods Sold		
Opening Inventory	$ 40 000.00	
Purchases	100 000.00	
Cost of Goods Available for Sale	140 000.00	
Closing Inventory	60 000.00	
Cost of Goods Sold		80 000.00
Gross Profit		20 000.00
Expenses		9 000.00
Net Profit		$ 11 000.00

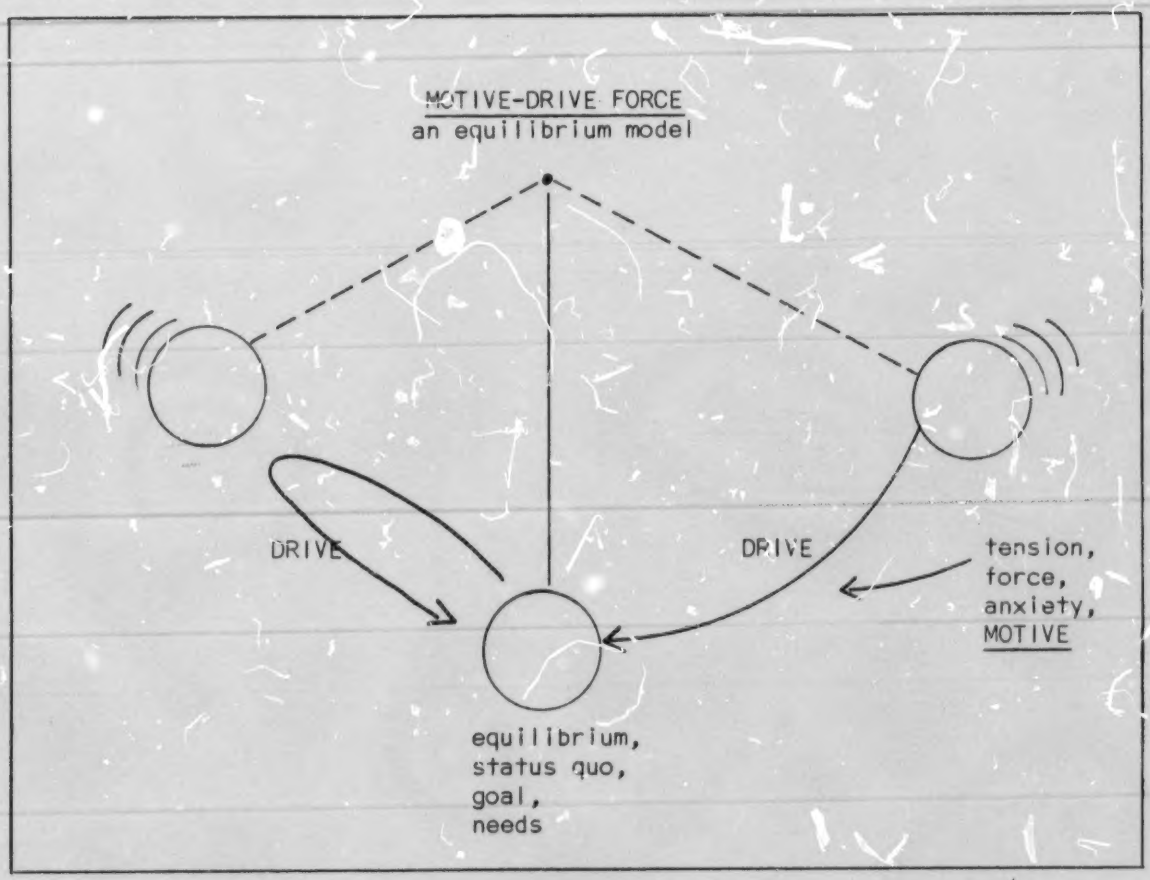

LINE ORGANIZATION
President
V/P Sales
V/P Production
Mgr. 1
Mgr. 2
Mgr. 3
Foreman
Foreman
Foreman

392

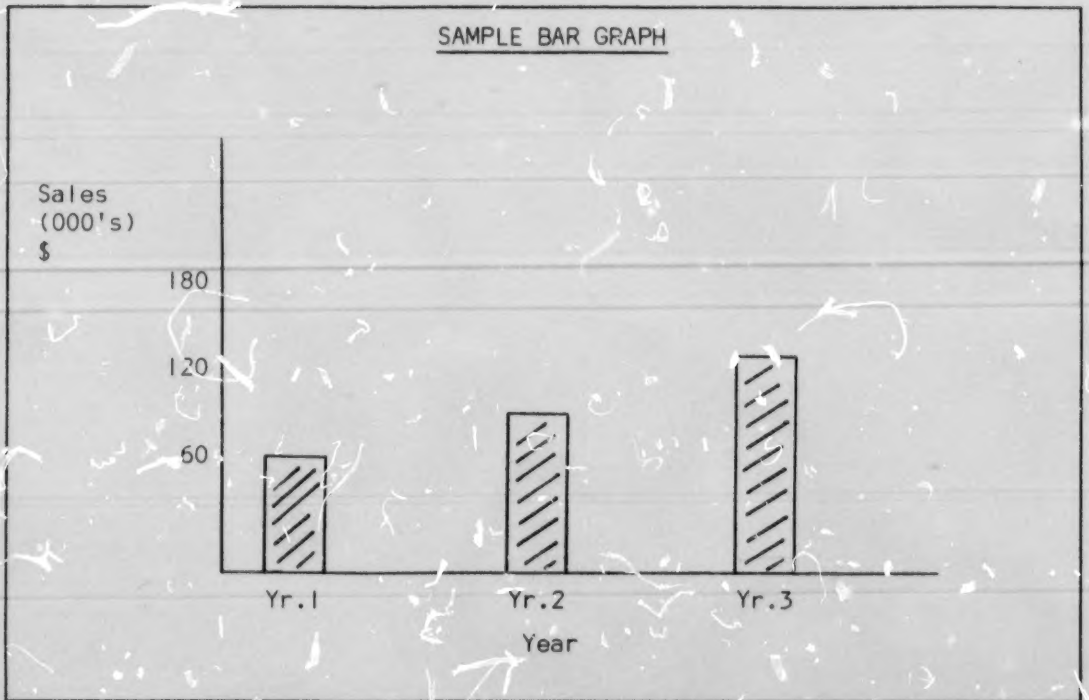

STAFF ORGANIZATION
President
V/P Sales
V/P Production
District Manager
Shop Supervisor


LINE AND STAFF ORGANIZATION
PRESIDENT
V/P Sales
V/P Production
District Mgr.
Merch. Mgr.
Personnel Mgr.
Shop Supervisor
Foreman
cutter
packer
painter

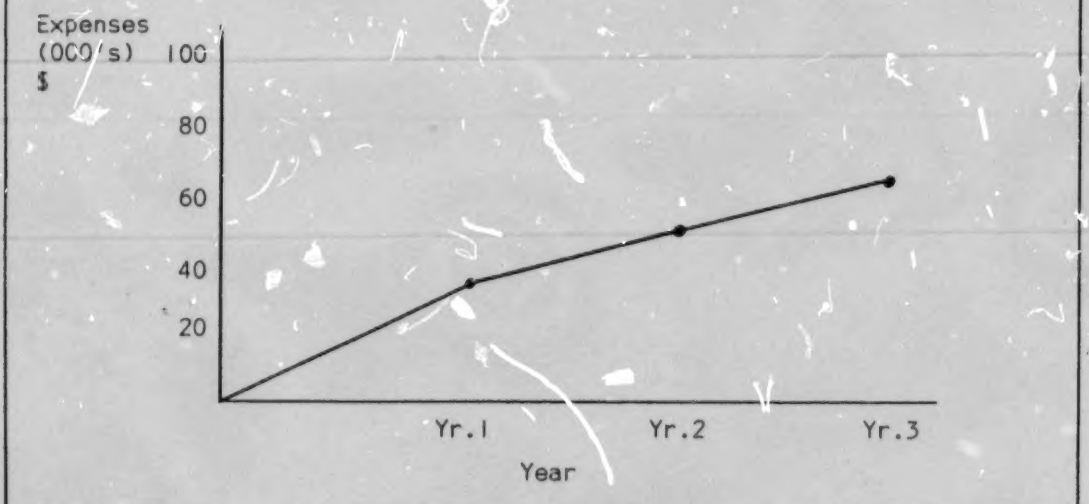

COMMITTEE ORGANIZATION
President
Sales Committee
Production Board
Maintenance Committee


MOTIVE-DRIVE FORCE
an equilibrium model
DRIVE
DRIVE
tension,
force,
anxiety,
MOTIVE
equilibrium,
status quo,
goal,
needs

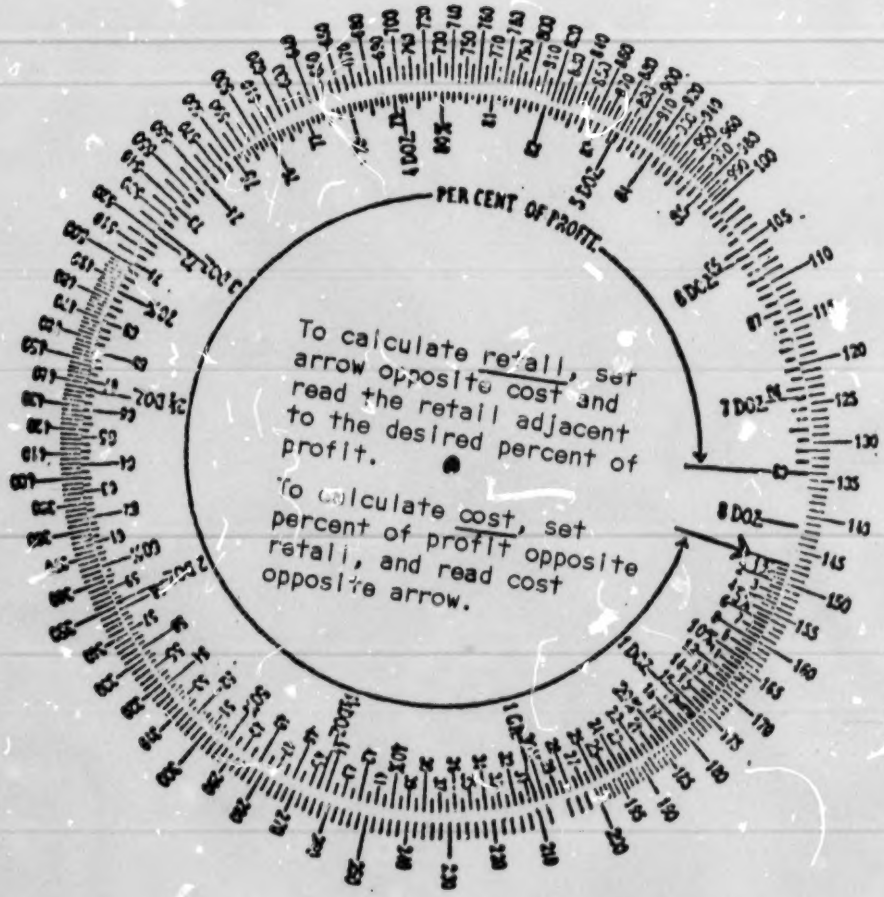
SAMPLE BAR GRAPH



SAMPLE LINE GRAPH



PROFIT METER


PER CENT OF PROFIT
To calculate retail, set arrow opposite cost and read the retail adjacent to the desired percent of profit.
To calculate cost, set percent of profit opposite retail, and read cost opposite arrow.